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Course Information

Course Title: *Organizing and Planning for a Divorce #296221*

Recommended CPE credit hours for this course

In accordance with the standards of the CFP Board and the IDFA, CPE credits have been granted based on a 50-minute hour.

CDFA® 5.5 (Certified Divorce Financial Analyst) IDFA sponsor #105392.

Course Description

Divorce encompasses every aspect of life: financial, legal, family, and personal, and is a process filled with mounds of paperwork. The *Organizing and Planning for a Divorce* course equips advisors and their clients with dozens of worksheets, logs, organizational tools, and checklists as well as expert advice and explanations to help you get everything under control.

Learn how to create a complete, complex record of all the information an attorney needs to successfully represent your client while at the same time getting help to get your client organized as he or she moves through the process.

Course Content

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Final exam (online): 34 questions (multiple-choice).

Program Delivery Method: Self-Study

Subject Codes/Field of Study

CFP Board of Standards, Inc., IDFA (CDFA®): General Financial Planning Principles, Divorce

Course Level, Prerequisites, and Advance Preparation Requirements

Program Level: IDFA (CDFA®): Intermediate.

This program is appropriate for professionals at all organizational levels.

Prerequisites: None

Advance Preparation: None

Instructions for Taking This Course

- **Log in to your secure account at www.bhfe.com. Go to "My Account."**
- **You must complete this course within one year** of purchase (If the course is "Expired," contact us and we will add the latest edition of the course to your account (no charge).
- **To retain the course-PDF after completion (for future reference) and to enable enhanced navigation:** From "My Account," Download and save the course-PDF to your computer. This will enable the search function (Menu: Edit>Find) and bookmarks (icon on left side of document window).
- **Complete the course by** following the learning objectives listed for the course, studying the text, and, if included, studying the review questions at the end of each major section (or at the end of the course).
- **Once you have completed studying the course** and you are confident that the learning objectives have been met, answer the final exam questions (online).

Instructions for Taking the Online Exam

- **Log in to your secure account at www.bhfe.com. Go to "My Account."**
- A passing grade of at least **70%** is required on the exam for this course.
- You will have three attempts to pass the exam (call or email us after three unsuccessful attempts for instructions).
- The exam is not timed, and it does not need to be completed in one session.
- For a printed copy of the exam questions, open the exam and press "Print Exam."
- Once you pass the exam, the results (correct/incorrect answers) and certificate of completion appear in "My Account." A confirmation email is also sent.
- CFP Board and IRS credit hours, if applicable, are reported on Tuesdays and at the end of the month.

Have a question? Call us at 800-588-7039 or email us at contact@bhfe.com.

Learning Objectives

After reading the materials, participants will be able to:

CHAPTER ONE - GETTING AND STAYING ORGANIZED

Manage the complex emotions involved in divorce

Understand the importance of an organizational system for divorce documents

Describe how organization saves money in a divorce

Explain the benefits of a master calendar

Comprehend the organizational methods available to clients for documents

CHAPTER TWO - PROTECTING YOURSELF

Specify the ways clients can protect financial assets at the beginning of a divorce

Identify the ways clients can protect their home at the outset of a divorce

Understand the methods which clients can use to protect digital assets at the start of a divorce

Comprehend the documents clients need to change once they begin a divorce

CHAPTER THREE - WORKING WITH AN ATTORNEY AND OTHER PROFESSIONALS

Understand the process clients should use to choose a divorce attorney

Identify what divorce attorneys need from their clients

Describe how clients should interact with their divorce lawyer

Comprehend how clients should organize information from professionals

Explain how to afford attorney bills

Recognize other professionals that may be involved in a divorce

CHAPTER FOUR - WAYS TO END YOUR MARRIAGE

Explain what residency is for a divorce

Understand some of the grounds for divorce

Describe the difference between annulment and divorce

Comprehend the difference between separation and divorce

Identify common law marriage

CHAPTER FIVE - STEP-BY-STEP THROUGH YOUR DIVORCE

Understand the initial papers required in a divorce

Comprehend what the discovery process is

Identify terms used in a divorce

Recognize court personnel involved in a divorce

CHAPTER SIX - SETTLEMENT OPTIONS

Explain what divorce mediation is

Describe the arbitration process

Understand collaborative law

Recognize the role of settlements

CHAPTER SEVEN - GATHERING HOUSEHOLD AND PERSONAL DOCUMENTS

Identify documents clients need to gather

Understand what clients should do when they cannot access some documents

Comprehend how client should organize documents

Explain how value of assets is determined

CHAPTER EIGHT - DOCUMENTING YOUR INCOME AND LIVING EXPENSES

Specify how clients should document monthly expenses

Understand how to create a monthly budget

Explain how to document monthly income

Identify how to document irregular expenses

CHAPTER NINE - LARGE ASSETS

Comprehend the difference between separate and marital property

Explain nonconcrete assets

Describe how large assets are divided in a divorce

Recognize how to find hidden assets

Identify the types of large assets involved in a divorce

CHAPTER TEN - DOCUMENTING DEBTS

Understand separate and marital debts

Explain how clients should organize their debts

Identify the types of debt involved in a divorce

CHAPTER ELEVEN - REACHING SETTLEMENTS AND DIVIDING PROPERTY

Explain how a client should come to a settlement in a divorce

Identify how to divide household items

Describe how pets are handled by a divorce court

Specify how to appraise items in a divorce

Comprehend how a client should divide disputed property

CHAPTER TWELVE - CHILD SUPPORT

Recognize the purpose of child support

Explain how child support is calculated

Comprehend the other items that can be included in child support

Describe how child support can be paid

Specify how to track child support payments

Identify how child support can be adjusted

CHAPTER THIRTEEN - ALIMONY

Explain how alimony is awarded

Describe how alimony is treated under tax law

Specify how health insurance is managed by a divorce

Identify how to track alimony payments

CHAPTER FOURTEEN - CUSTODY AND VISITATION

Describe what temporary custody is

Explain how custody is determined

Recognize the evidence a client should gather for a custody case

Specify how to create an accurate visitation record

Understand shared custody

Comprehend how to monitor children's responses to visitation

CHAPTER FIFTEEN - WITNESSES AND EVIDENCE

Explain why witnesses are needed in a divorce

Identify what hearsay is

Understand the types of witnesses related to alimony

Recognize the types of witnesses related to child support

Comprehend the types of witnesses related to property and debt division

Understand what physical evidence is

CHAPTER SIXTEEN - CUSTODY TRIALS

Understand how a client can document the past for a custody trial

Comprehend how a client can document their own parenting abilities

Explain the role of parenting classes

Describe what a childcare checklist is

CHAPTER SEVENTEEN - IT IS ALL OVER! NOW WHAT?

Identify how a client can change their name after divorce

Explain how insurance needs to be updated after divorce

Recognize how to divide assets after a divorce

Specify the impact of a divorce on a lease

Comprehend how a client should handle attorney bills

Describe the options for tax filings after a divorce

Understand the documentation that is necessary after a divorce is finished

Notice

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