**Jennifer Failla**
*866-526-7098*
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**Divorce Planner ♦ Wealth Manager ♦ Fee-Only ♦ Transparent ♦ Educative**
Seasoned Wealth Manager with 15 years of experience

**DIVORCE FINANCIAL ANALYST AND PLANNER**

**Marital Lifestyle Analysis:** Reconstruction and organization of client's lifestyle expenses using a comprehensive analysis of all spending records to determining a marital standard of living. Information is used to determine future projected needs.

**Pre-Settlement/Equitable Division Analysis:** Settlement review, coordination, strategy and attorney support.

**Financial Education:** Educate client about crucial financial concepts in order for an effective, realistic and sustainable settlements. This brings clarity to the financial jargon and helps the divorce process proceed more smoothly.

**Financial Tracing:** Tracing of financial statements to categorize flow of funds, potential credits and/or reimbursements. Tracing is used to help acknowledge separate property claims.

**Financial Team Participation and Coordination:** Coordinate the client's financial strategies with other financial experts including but not limited to accountants and attorneys. Participating in a team approach to divorce helps maintain the integrity of the client's needs.

**Post-Settlement Private Wealth Management:** Creation and application of a disciplined financial advisory and money management process to help clients preserve and build upon their financial settlements. The process involves organizing, facilitating, and tracking outstanding financial tasks pursuant to the settlement agreement.

## LICENSES, CERTIFICATIONS, AND PROFESSIONAL DESIGNATIONS

•CDFA: Certified Divorce Financial Analyst
•Investment Advisor Representative
•FINRA Series 7 Registration
•FINRA Series 66 Registration
•Life & Health Insurance License
•Florida Supreme Court Family Mediator

## EDUCATION

University of Nebraska
•Master's in Family and Consumer Sciences – Family Financial Planning
•Magna cum laude

Saint Mary's College
•Bachelor of Business Administration: Finance Concentration
•Financed 90% of education through full-time employment and student loans
•Completed college requirements in three and one half years

## RECENT COURSES AND TRAINING

**Institute for Divorce Financial Analysts**
•Asset Tracing
•QDRO Key Concepts and Drafting
•Cobra and Healthcare Coverage
•Pension Valuations
•Divorce and Taxes
•Marital Lifestyle Analysis
•Stock Options in Divorce

**International Academy of Collaborative Professionals**
•Basic Interdisciplinary Training
•Advanced Interdisciplinary Training
•Interdisciplinary Training

**College for Financial Planning**
•Financial Planning Process and Insurance
•Investment Planning
•Income Tax Planning
•Retirement Planning and Employee Benefits

## PROFESSIONAL EXPERIENCE

**Principal, Investment Professional** Strada Wealth Management
PlanningThruDivorce, LLC
•Principal of a fee-only comprehensive financial planning practice.
•Develops comprehensive financial plans integrating tax and estate goals and objectives.
•Organizes financial management of households.
•Researches appropriate investments for complete portfolio diversification.
•Educates clients on cash management and debt removal.
•Reviews financial data for attorneys and their clients; create budgets and cash flow reports used in determining child and spousal support; prepare inventory; trace and characterize separate vs. community property; prepare financial exhibits.
•Evaluates investment/bank statements and tax returns to assist attorneys and clients in discovery process.
•Examines and evaluates retirement plans with detailed analyses on retirement cash flow.
•Creates financial projection reports based on various scenarios of asset division in marriage dissolution cases.
•Educates clients about financial issues relating pursuant to divorce.

**Private Client Investment Professional** Merrill Lynch
•Broad range of expertise in specialties such as credit, concentrated stock strategies, and trust and estate planning services
•Access to a proven process with a suite of robust tools to ensure that unique needs are understood and met.
•Proper management of investment portfolios focusing on the client's needs while managing risk exposure.
•Providing families with sophisticated expertise in serving the special financial and lifestyle needs of uniquely successful families.
•Charitable gifting strategies designed to remove assets from an estate and reduce estate taxes.
•Integrating business services so cash works harder and smarter for owners.

- Organized presentations to prospective clients
- Organized and hosted seminars for prospective clients
- Researched new products for client suitability
- Cold called prospective clients, built new client database, and managed mass mailings

## ORGANIZATIONS

- Volunteer, Institute for Divorce Financial Analysts
- Committee Member, Association for Divorce Financial Planners
- Member, International Academy of Collaborative Professionals
- Member, Collaborative Law Institute of Texas
- Board Member, Collaborative Family Law Institute, Florida
- Volunteer, Jewish Federation of Miami

## CONTACT

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