

# ClearPath

# YOUR ROADMAP TO A SMOOTHER DIVORCE



**SHOCKED • CONFLICTED • CONFUSED**

## Am I Ready?

Understand options to prepare

### PERSONAL CHECKLIST

- Reflect on what led to breakdown of marriage
- Explore discernment counseling
- Research the divorce process

### BDF RESOURCES

- "Is Divorce the Right Road to Take" guide
- Priority Clarification worksheet
- Pre-divorce checklist



**FEAR • ANXIETY • SHAME**

## What Resources Do I Need?

Feel organized and in control

- Open a bank account and credit card in your own name
- Get your credit report
- Gather financial documents
- Hire your attorney and professional team

- Divorce Bucket List worksheet
- Divorce process guide
- Attorney recommendations based on your family's unique needs
- Attorney interview guide



**OVERWHELMED • ANGER • RESENTMENT**

## What's My Reality?

Make sound decisions with confidence

- Complete financial disclosures
- Resolve parenting time and decision making
- Understand settlement options
- BREATHE—it will be ok.

- SettleSmart<sup>SM</sup> analysis
- Marital balance sheet review
- Marital Settlement Agreement (MSA) summary



**UNSETTLED • HOPE • EXCITEMENT**

## How Do I Prepare for My Next Chapter?

Step boldly into your future

- Finalize divorce; prove up
- Prepare for post-decree implementation
- Expect and plan for change, challenges and growth
- Own YOUR next chapter!

- Management of cash flow, investments and taxes
- Marital Settlement Agreement (MSA) implementation
- Retitling of accounts
- Coordination of insurance coverage, estate plan, charitable gifting and college planning

# GUIDING YOU FROM START TO FINISH



## Find Help Wherever You Are

No matter where you live or what stage in the divorce process you are, BDF's national network of divorce attorneys and professionals will help you separate the emotional aspects of divorce from the business aspects so you can make sound decisions.

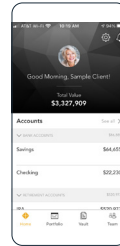


SETTLESMA<sup>SM</sup>

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## Make Informed Decisions

BDF SettleSmart<sup>SM</sup> combines more than 35 years of wealth management wisdom with advanced quantitative algorithms to project how your divorce decisions today may impact your lifestyle far into the future.



## Get Data at Your Fingertips

No more fretting about finding your paperwork! With our proprietary MyBDF app\*\*, you get instant secure access to your balances and shared documents at the touch of a button.

## Build Your Confidence



### AWARD-WINNING SPECIALIZATION

With over 35 years in business, our 60+ team members manage more than \$5.3 billion\* of hard-earned wealth for over 1,400\* families across the U.S.

### THE INDUSTRY AGREES!\*

- Forbes 2020 Top Wealth Advisors
- Barron's 2021 Top 100 RIA Firms
- Investment News 2021 Best Places to Work for Financial Advisers



### A TEAM THAT CARES

Get clarity on your next steps right away. Schedule your confidential discovery call with our specialized team. Contact our Divorce Practice Group at 312.312.2144 or [TheNextChapter@bdfllc.com](mailto:TheNextChapter@bdfllc.com)

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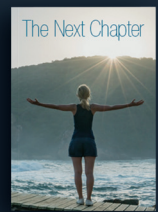


## Financial Issues in Divorce & The Next Chapter

Practical roadmaps for navigating through, and beyond, divorce

From contemplating divorce through negotiations and finding what you want in your next chapter, our books prepare you for this difficult journey.

Email [TheNextChapter@bdfllc.com](mailto:TheNextChapter@bdfllc.com) for complimentary divorce tools and resources.



\* As of March 16, 2021. Rankings, client retention claims, recognition, survey results, and/or recognition by unaffiliated services or publications should not be construed by a client or prospective client as a guarantee that they will experience a certain level of results or investment performance if BDF is engaged, or continues to be engaged, to provide investment advisory services, nor should it be construed as a current or past endorsement of BDF by any of its clients. Survey results published by BDF are based on questions and information prepared by BDF. Rankings published by third parties, including magazines, are generally based exclusively on information prepared or developed by the recognized adviser.

\*\* Hypothetical, for illustrative purposes only.