



Financial Planning on Separation Conference 2024

Down the rabbit hole – a Financial Planner’s journey into the world of advising on divorce and separation

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#ResFAConf

Bit of background....

- Live and work in York
- Chartered Financial Planner & Fellow of the PFS
- Resolution Accredited since 2023

Objectives of this presentation

- Mainly aimed at Advisers developing their work in this area and who are considering the Resolution Accreditation, but hopefully resonates for everyone!
- Explain my journey through this work and to Accreditation
- Developing divorce work and working with other professionals
- Life after Accreditation – what does it do for you?

Got to start somewhere....

- 1st proper divorce case in 2012
- Client was H (still a client now)
- Pensions, properties and cash
- No solicitor, but financial disclosure had taken place
- Not amicable....



“Your Financial Adviser is
clearly f****ng useless...”

Audience Participation

Who was W's tax adviser?

A. Personal Trainer

B. Estate Agent

C. Doctor

B – Estate Agent



Development & Professional Connections

- Started to get more work from 1st client solicitor
- Understood more that the basic principles of financial planning applied – peace of mind
- Gained confidence, word spread
- Made myself available



Accreditation

- It's not for everyone....
- Honesty about your motivation for doing it (it's not about AUM...)
- Entirely different to the CII exams – competencies and code
- I did ok in 2, but crashed and burned in the other.....

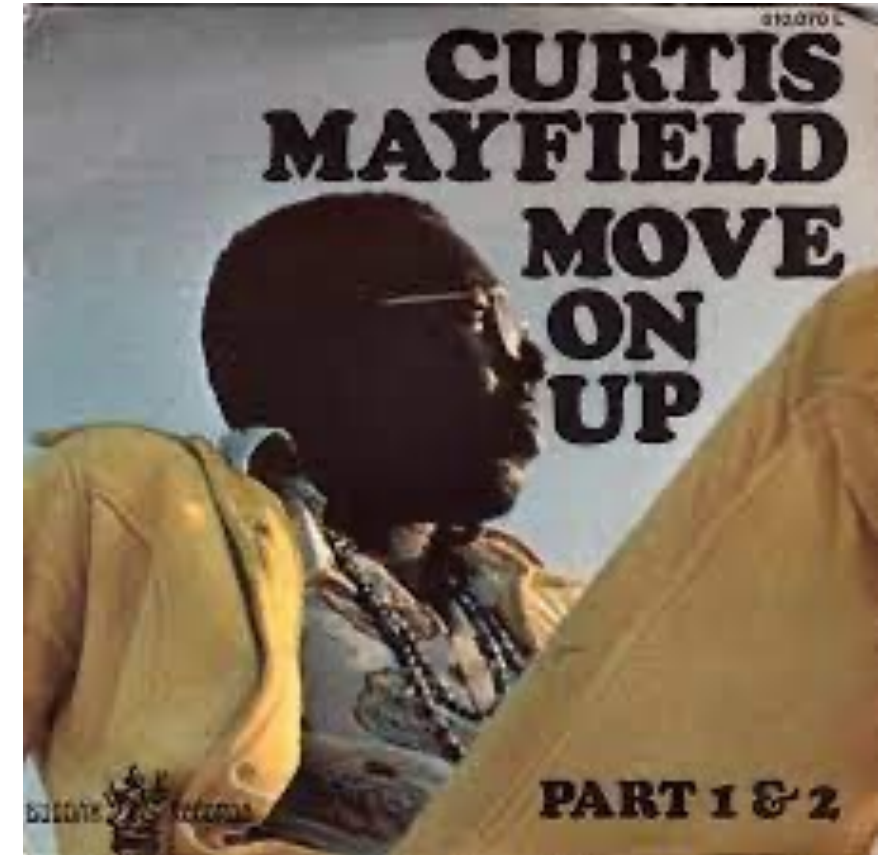


Audience participation

2%

Life after Accreditation

- Doors have opened!
- Joined local POD
- Started making plans to work more as a financial neutral in mediation/collaborative
- Dealing with wider variety of work – trust from solicitors is clearly there
- Better understanding of issues solicitors need to deal with
- A prestigious qualification that's worth having





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Thanks for listening – any questions?

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Please connect on LinkedIn!



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