



## **Financial Planning on Separation Conference 2024**



**#ResFAConf**

# Workshop and Roundtable discussion Issues and pitfalls in our work:

- Expert reports – to do or not to do.
- Marketing – getting the right enquiries.
- Working in Mediation and other DR settings
- Best practice – what is working now?
- Fees – what to charge, when to charge, how to charge.
- Practical, time-saving tips to use in your business.

# Expert reports – to do or not to do:

- Either decide to do them all the time or don't do them at all.
- What's your motivation? Client Acquisition?

# Marketing – getting the right enquiries:

- What works well for us
- What doesn't work so well

# Working in Mediation and other DR settings:

- Be clear on what you do/who your target market is
- Do you enjoy working with a couple or just one side – be secure on your choice.
- Difference between a neutral and an IFA that is supporting one side

# Best practice

## What is working now?

- Cash flow modelling in divorce setting
- Sharing ideas with other divorce professionals
- Facebook group
- LOAs to providers for PSO along with Annex

# Fees

## What to charge, when to charge, how to charge:

- Hourly or fixed fee
- Our model what and when

# Practical, time-saving tips to use in your business:

- How could we use AI to save time?
- Clear processes and templates
- Be clear on Target Market
- Have a filter to filter out non target market leads
- Videos for clients