

Earlybird Special!

Save \$100 if you book and pay for the Workshop before May 6, 2011*

Cost: \$895 per person; \$795 for CDFAs

**Enter or quote code Denver11 to receive \$100 off these prices!*

Hotel: Grand Hyatt Denver

Conference Room Rates: \$159 and \$184
(Mention IDFA as the group code to receive this rate)

Reservations: 1-888-421-1442

Hotel Reservation Cut-off Date: 05/11/11

Topic Highlights:

- ◆ Alternative Dispute Resolution
- ◆ Executive and Deferred Compensation
- ◆ Practice Management Techniques
- ◆ QDROs: Essentials and Drafting
- ◆ Same-Sex Divorces
- ◆ Special Needs: Special Divorce
- ◆ Divorce and Mortgages: The Realities
- ◆ Valuing Businesses and Funds

Denver, CO June 2–4, 2011

IDFA USA National Conference 2011

- ◆ \$895 per person
- ◆ \$795 for CDFAs members
- ◆ *Earlybird prices: \$795 and \$695*

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Who should attend?

The level of this series is advanced; attendees will include CDFAs™, CPA, CFPs®, financial professionals, and lawyers. Even if you have attended a prior Advanced Workshop, you won't want to miss this newest series.

Receive up to 18 CE Credits for your CDFATM, CPA, CFP®*, ChFC, or CLU designations!

** Pending final approval*



Cancellation Policy: Cancellations received up to 14 working days before the workshop are refundable, minus a \$50 registration service charge. After that, cancellations are subject to the entire fee, which you may apply toward a future conference or workshop. Please note: if you don't cancel and don't attend, you are still responsible for payment. Substitutions may be made at any time. For more information regarding refund, complaint, and/or program cancellation policies, please contact our office at 1-800-875-1760.

Prerequisites

No advance preparation is required. In order to attend, you must currently be a CDFATM, CPA, CFP®, financial professional, or a lawyer.

Join us in Denver from June 2 to 4, 2011 to acquire new skills and knowledge, network with your peers, and discover new opportunities in a tough market.

The Topics and Presenters

Alternative Dispute Resolution. Increasingly, divorcing clients have been demanding alternatives to the traditional court process. This seminar will provide an introduction to Collaborative Divorce and Mediation, and discuss the expanding role of the neutral financial professional within these models. A Regional Director for IDFA™, **Natalie Nelson (MBA, CFP®, CDFA™)** has been trained in both Collaborative Divorce and Mediation; she is recognized for her expertise in mediating the financial aspects of divorce.

The ABCs of DFA – Avoiding the Worst Financial Mistakes and Pitfalls. An overview of the Divorce Financial Analysis process, highlighting how CFAs™ can help to save their clients from critical errors commonly made by attorneys and other financial professionals. IDFA™ Regional Director **Janet Bouma (CDFA™)** provides regular lectures to accountants, financial planners, and lawyers about the financial aspects of divorce.

Business Valuation for the Divorce Financial Professional. This session is intended to teach the business valuation basics that all financial divorce professionals need to know. Other topics include hedge-fund valuation and identifying what we need to be aware of related to valuation in the context of a divorce. **Mark Harrison (CPA, ABV, CFF, Esq.)** is Managing Member of Meyers Harrison & Pia, LLC.

Divorce and Mortgages – Theory vs. Reality. The mortgage industry has gone through unprecedented changes over the past few years making it much more difficult to obtain home financing, especially after divorce. **Tom Schreiner** is a Certified Mortgage Lender, CML®, with Cherry Creek Mortgage headquartered in Denver, CO.

Executive and Deferred Compensation. An introduction to executive and deferred compensation: what you need to know, and how you can help attorneys deal with these complex issues. **Timothy M. McNamara (CIMA, CFFA, CDFA™)** and **Tracey M. Manzi (CFA, AVA, CFFA, CDFA™)** are the co-founders of ClearView Divorce in Boston, MA.

Practice Management Techniques. Most of us learn by trial and error in the early years of establishing a new area of specialty. This session will eliminate some of the growing pains and help you avoid mistakes of those that have come before you. **Sherry V. Wyble (CFP®, CDFA™)** is an owner of Scott Private Wealth Group in Greensboro, NC;

Melissa Attanasio (CFP®, CDFA™) is Managing Principal of Attanasio Financial Strategies Group in Las Vegas, NV.

QDROs Level I – Essentials. Whether you want to incorporate QDRO drafting into your practice or just need to know how to review a one, you'll gain a thorough understanding of QDRO concepts and strategies. **Janet Bouma (CDFA™)** will share her 11 years of experience gleaned from QDRO drafting and evaluating pensions in her divorce practice.

QDROs Level II – Drafting QDROs: from Concept to Composition. Learn about the types of QDROs, their concepts, and the specific language they use. Avoid the pitfalls that can trap the unwary. The president of QDROExpress, **Robert Treat (JD)** has prepared or reviewed more than 5,000 QDROs.

Same-Sex Divorces and Domestic Partnerships. There are a number of challenges and issues that set state-registered domestic partners, common-law partners, or same-sex married spouses apart from straight married couples when it comes to divorce. This session covers how to handle the most common issues that arise when same-sex and domestic partners break up. **David N. Horowitz (JD)** serves on the Arizona State Senate Domestic Relations Committee.

Special Needs: Special Divorce. Topics to be addressed include: how to understand, gather data, quantify, and present the special financial needs of these children; and essential mistakes to avoid when helping your clients negotiate child support. Taught by a Regional Director for IDFA™ who is also a divorced mother of a special-needs child, **Michelle Smith (CFP®, CDFA™)** will be sharing her (trademark-pending) worksheets and templates to help you from Intake/Initial meeting throughout the settlement process.

For more information, or to reserve your space in the Conference, please contact IDFA™ today.

- ◆ Phone: (800) 875-1760
- ◆ Fax: (989) 794-5990
- ◆ E-mail Shar.Banks@InstituteDFA.com
- ◆ Website: www.InstituteDFA.com



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The Schedule

Thursday, June 2nd

8:00 a.m.–9:00 a.m.: Breakfast and Registration

9:00 a.m.–12:00 p.m.

- ◆ **Room A:** “Divorce and Mortgages”
- ◆ **Room B:** “Alternative Dispute Resolution”
- ◆ **Room C:** “The ABCs of DFA: Avoiding Pitfalls”

12:00 p.m.–1:00 p.m.: Lunch

1:00 p.m.–4:00 p.m.

- ◆ **Room A:** “Valuing Businesses and Funds”
- ◆ **Room B:** “Same-Sex Divorces”
- ◆ **Room C:** “Special Needs Divorces”

4:00 p.m.–6 p.m.

- ◆ **Networking and Cocktail Reception**

Friday, June 3rd

8:00 a.m. –9:00 a.m.: Breakfast

9:00 a.m. –12:00 p.m.

- ◆ **Room A:** “Valuing Businesses and Funds”
- ◆ **Room B:** “Same-Sex Divorces”
- ◆ **Room C:** “Executive and Deferred Compensation”

12:00 p.m.–1:00 p.m.: Lunch

1:00 p.m.–4:00 p.m.

- ◆ **Room A:** “Understanding QDROs - Level I”
- ◆ **Room B:** “Practice Management Techniques”
- ◆ **Room C:** “Divorce and Mortgages”

Saturday, June 4th

8:00 a.m. –9:00 a.m.: Breakfast

9:00 a.m.–12:00 p.m.

- ◆ **Room A:** “Understanding QDROs - Level II”
- ◆ **Room B:** “Practice Management Techniques”
- ◆ **Room C:** “Special Needs Divorces”

12:00 p.m.–1:00 p.m.: Lunch

1:00 p.m.–4:00 p.m.

- ◆ **Room A:** “The ABCs of DFA: Avoiding Pitfalls”
- ◆ **Room B:** “Alternative Dispute Resolution”
- ◆ **Room C:** “Executive and Deferred Compensation”