

## Topics include:

- ◆ Fiscal Cliff Tax Changes, Tips, and Traps
- ◆ Depositions and Testimony: Best Practices
- ◆ Stock Options, Restricted Stock, and Deferred Compensation Plans
- ◆ Applied Behavioral Finance in Divorce
- ◆ Managing High-Conflict Divorce Clients
- ◆ Being a Financial Neutral

San Diego, CA April 18–20, 2013

## IDFA's CE by the Sea Conference 2013

- \$945 per person
- \$845 for active CDFATM members

Cost: \$945 per person; \$845 for CDFAs

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IDFA Special Room Rates: \$185/night  
(Mention IDFA as the group code to receive this rate)

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## Who should attend?

The level of this series is intermediate to advanced; attendees will include CDFA professionals, CPAs, CFPs®, financial professionals, matrimonial paralegals, and family-law or matrimonial attorneys.

**Receive up to 17 CE Credits for your  
CDFATM, CPA, CFP®, and ChFC®  
designations.**



## Prerequisites

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

**Join us in San Diego April 18–20 to  
acquire new skills and knowledge about  
divorce and network with your peers.**

**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.

# The Topics and Presenters

**Applied Behavioral Finance in Divorce Negotiations.** The ambiguity of a now unknown financial future creates high levels of anxiety in clients navigating divorce. This session will provide a practical and pragmatic way of conceptualizing the social, cognitive, and emotional factors, biases, and road-blocks that complicate financial decision-making in divorce. The result: help your clients make better financial decisions. **Justin Reckers (CFP®, CDFATM, AIF)** has published more than 30 articles in financial and family law journals on behavioral finance and its applications in dispute resolution.

**Being a Financial Neutral.** CDFATM professionals and the attorneys who hire them recognize that a critical skill needed to facilitate settlement is the ability to act as a financial neutral. Whether in mediation or the collaborative setting, CDFATM pros who possess and refine their skills to work as a neutral offer tremendous value as settlement agents. **Mark Hill (CFP®, CDFATM)** is one of the top financial neutrals (and a pioneer in the collaborative space) in North America. He is a nationally-recognized speaker on the financial aspects of divorce and a past-president of the Collaborative Family Law Group of San Diego.

**Depositions and Testimony: Best Practices.** Building or attaining a robust CDFATM practice will undoubtedly lead to possible depositions or some type of defending and questioning of work product. Whether a testifying expert, a trial consultant, or just hired by the client, this session will identify potential traps in your work product and analysis that every CDFATM professional needs to be mindful of and prepared for. **Tracy Blethen (CFE, CDFATM)** is a principal at Torrey Partners with more than 15 years' experience providing litigation support services in the marital dissolution setting. In 2012, **Puja Sachdev (JD, MSBA, CDFATM)** was selected as one of San Diego's Best Attorneys in Family Law by *SD Metro Magazine*. She is the only family law attorney in San Diego with the CDFATM designation.

**Managing High-Conflict Clients in Divorce.** High conflict people are not just difficult people: they are *the most* difficult people because they become preoccupied with a target of blame – like their ex, their attorney, or their CDFATM professional. This workshop will help you understand the predictable dynamics of high-conflict clients, help you avoid common mistakes in handling them, and provide you with tips for managing them in your practice.

**Megan Hunter (MBA)** is the co-founder of High Conflict Institute, which provides education and resources to professionals handling High Conflict disputes.

**Stock Options, Restricted Stock, and Deferred Compensation Plans.** Dealing with complex types of executive compensation that are both property and income can be daunting and sometimes overwhelming. This presentation will demystify them and explain how to know they exist, value, divide, determine income and grapple with tax ramifications. **Thea Glazer (CPA, CFP®, CDFATM)** has worked with divorcing individuals and members of their divorce teams for more than 20 years. She has testified as an expert witness in numerous divorce cases regarding complex financial matters.

**Tax Changes, Tips, and Traps.** The new tax laws will have a large impact on upper income earners and their divorce, including bringing back the phase-outs for Personal Exemptions and Itemized Deductions and ending the so-called “payroll tax holiday”. This session will provide updates on tax changes that have occurred because of the Fiscal Cliff as well as point out tax tips and traps for divorcing individuals – and the professionals who are working with them. We'll discuss the current tax implications regarding property division, sale of the home, spousal and child support, attorney fees, dependency exemptions, and distributions of retirement plans. **Ginita Wall (CPA, CFP®, CDFATM)** was named one of the top financial advisors in the country by *Worth Magazine* for eight years in a row. She is also originator of the acclaimed Second Saturday Divorce Workshops.

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

- ◆ Phone: (800) 875-1760
- ◆ Fax: (888) 473-1073
- ◆ E-mail [info@InstituteDFA.com](mailto:info@InstituteDFA.com)
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# The Schedule

## Thursday, April 18th

**7:00 a.m.–8:30 a.m.: Breakfast and Registration**

**8:30 a.m.–10:25 a.m.**

- ◆ “Being a Financial Neutral”

**10:45 a.m.–12:45 p.m.**

- ◆ “Stock Options, Restricted Stock, and Deferred Compensation Plans”

**12:45 p.m.–1:45 p.m.: Lunch**

**1:45 p.m.–5:00 p.m.**

- ◆ “Applied Behavioral Finance in Divorce Negotiations”

**5:00 p.m.–6:00 p.m.**

- ◆ **Networking and Cocktail Reception**

## Friday, April 19th

**7:30 a.m.–8:30 a.m.: Breakfast**

**8:30 a.m.–10:25 a.m.**

- ◆ “Tax Changes, Tips, and Traps”

**10:45 a.m.–12:45 p.m.**

- ◆ “Depositions and Testimony: Best Practices”

**12:45 p.m.–1:45 p.m.: Lunch**

**1:45 p.m.–5:00 p.m.**

- ◆ “Managing High-Conflict Clients in Divorce”

## Saturday, April 20th

**8:00 a.m.–9:00 a.m.: Breakfast**

**9:00 a.m. –12 noon**

- ◆ “CDFATM Jeopardy”: A lively panel of leading CDFATM professionals from across the country will answer your burning and most frequently-asked questions - regardless of your level of experience. Topics will include practice management; case management; best practices; building your divorce brand and practice; and developing relationships with attorneys, CPAs, and other professionals in the divorce arena.

*Moderator: Michelle Smith (CFP®, CDFATM)*

*Panelists: CDFATM pros Melissa Attanasio, Seth Kaplan, Justin Reckers, Gigi Robson, and Sue Slater.*