Alan Ross Frisher, CDFA™

Mr. Alan Frisher's practice deals not only with divorce issues, but also offers comprehensive financial planning solutions for individuals, couples, and business owners. He is a licensed Financial Advisor who earned the Certified Divorce Financial Analyst™ designation. With many years of experience in comprehensive financial planning, Alan Frisher established Sage Divorce Planning, LLC to demonstrate his commitment to providing the highest level of professionalism and personal service when dealing with the financial issues of divorce. Mr. Frisher is also a founding member of the Collaborative Association of Brevard, a not-for-profit organization consisting of attorneys, mental health providers and financial professionals, all working together to enable couples going through marital divorce to preserve family values of respect, caring and consideration.

Alan serves as consultant to divorcees and Family Law Attorneys by focusing on comprehensive financial planning and asset management. He earned a BA degree, with honors, in Economics from the City University of NY. Alan also earned a Masters and Ph.D. in Nutritional Science from State-approved Donsbach University* in Huntington Beach, California. His passion for helping those couples going through marital divorce stems from the fact that he has personally experienced the process, challenges, and recovery of marital divorce, up to and including the Appellate Jurisdiction. In his spare time, he devotes himself to helping raise his three children, playing tennis, composing songs, reading, and always learning.

*Donsbach University was California State Approved, but not part of a national accreditation program

About the CDFA™ Designation

A Certified Divorce Financial Analyst (CDFA) has:

Graduated from the Institute for Divorce Financial Analysts, extensive experience in the financial services industry, received specialized training in the financial issues of divorce and, fulfilled continuing education requirements.

The institute was founded in 1993 and is the most established and recognized designation in financial planning for divorce. The institute for Divorce Financial Analysts offers a credential for financial professionals in the divorce arena. A candidate must successfully complete four exams based on a self-study course offered by the Institute, be in good standing with his or her firm or broker/dealer, any government regulatory agencies, and complete 20 hours of continuing education courses every two years.

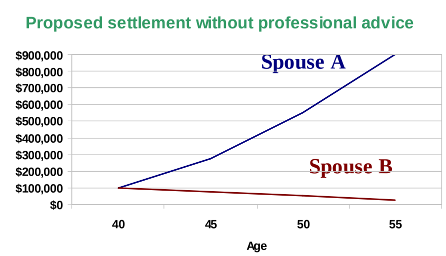
Institute for Divorce Financial Analysts™

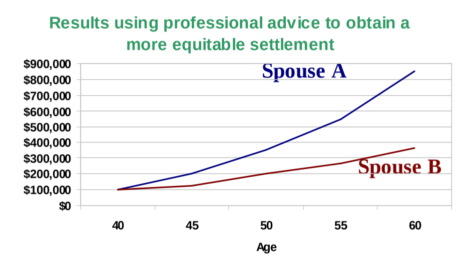
$age Divorce Planning

To arrange a meeting with Alan Frisher, please contact him at:
7630 N. Wickham Rd. Suite 102
Melbourne, FL 32940
(321) 242-PLAN (7526)
Fax: (321) 242-3285

"I care, because I've been there!" – Alan Frisher

Divorce and Finances
For Attorneys





Sage Divorce Planning, LLC
Alan Ross Frisher, CDFA™
Financial Advisor
Certified Divorce Financial Analyst

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"A growing number of the 1.1 million divorcees every year are calling on the services of divorce planners."--- Minnesota Star Tribune

"CDFA's can provide invaluable information that allows the court to arrive at a fair, equitable, and just resolution not just at the moment of trial, but down the road as well."---Hon. Kathleen M. McCarthy, Family Court Division Judge, Divorce Magazine

Why a Financial Advisor?

As a legal professional working with clients going through a divorce, you may often be asked to help compile your client's necessary financial documents relating to the case or for guidance with investing the proceeds from a settlement. It makes sense to bring into the team an experienced financial advisor to address monetary and investment issues. This will allow for a different perspective regarding the client's economic independence.

Since divorce typically involves financial issues, you may want to consider adding a seasoned Financial Advisor to your team. While accounting professionals have an orientation towards historical data, their area of specialization may leave a gap in the continuum of knowledge needed by both the clients and attorneys.

As a Certified Divorce Financial Analyst™, and licensed Financial Advisor with many years of experience in comprehensive financial planning, Alan Frisher specializes in helping family law Attorneys and their clients manage the financial issues of divorce. He can examine the financial matters during this time and provide you, your client and any other professionals on your team with useful data.

Sage Divorce Planning

Sage Divorce Planning helps you with the Initial Review:

- Document marital standard of living through historical spending analysis (Lifestyle Analysis).
- Compile, organize and value assets and liabilities.
- Review tax returns and financial statements.
- Review and help prioritize goals.
- Estimate immediate needs.
- Track cash-flow through bank and brokerage statements.
- Review employee benefit plans.

Sage Divorce Planning can help during Negotiations with:

- Understanding the potential tax impact of settlement proposals.
- Developing realistic post-divorce cash-flow estimates.
- Calculating appropriate amounts of life insurance for use as collateral against support payments.
- Calculating value of marital versus separate property of IRAs, 401(k) and pension plans.
- Reviewing retirement and educational funding programs.
- Evaluating the stocks, bonds and other investments to be divided.
- Discussing the potential long-term financial effects of the settlement with various scenarios.
- Reviewing of QDRO documents.
- Providing for reliable expert witness testimony if your case goes to court.

Sage Divorce Planning will assist Post-Divorce by:

- Suggesting spending and money-management plans.
- Answering questions, including how best to invest for the client and children, if any, and how to prioritize so that long-term needs can be met.
- Implementing financial planning strategies.
- Monitoring results and updating financial strategies as withdrawal needs change.

Add Experience to Your Team

Mr. Frisher acts as a member of your team to educate your divorcing client, gather the necessary financial documents, develop potentially tax-effective strategies and make recommendations to help your client towards economic independence.

Including an experienced Financial Advisor in the divorce process can help set a higher standard of matrimonial practice and more efficient utilization of your time as a legal professional. Attorneys can save much of the time spent on financial detail, while clients may obtain a more in-depth understanding of their financial choices.

As a result, case-preparation and arriving at an equitable settlement may be easier because we do the financial work for you.

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