Questions to Ask a Certified Divorce Financial Analyst (CDFA®)

Working with a CDFA®

1. How long have you been practicing as a CDFA®?
2. Do you work in collaboration as an alternative to court or mediation?
3. Can you work with my existing lawyer?
4. Can you refer me to a lawyer that specializes in divorce?
5. How do you charge for your services, and how much?
6. Do you have any other licenses or credentials besides the CDFA® certification?
7. What types of clients do you specialize in?
8. Do you or your firm provide any other services (i.e. financial planning)?
9. Can I see a sample of a settlement/financial plan you would provide your clients with?
10. How much contact do you have with your clients?
11. Do you maintain a relationship with clients after divorce?

Ongoing Investment Management and Financial Planning Support

12. How will my portfolio be tailored to fit my risk tolerance?
13. What is your investment philosophy?
14. What strategies do you employ to limit taxes?
15. What services do you offer beyond investment management?
16. How often will you evaluate my situation and make necessary changes?
17. How can I keep track of my spending and budgeting? Do you have any tools that can help me do this more easily?
18. What makes your client experience unique?

Compensation and Fiduciary Duty

19. How is the firm compensated? Do you charge for financial planning?
20. Are you fee-only? Do you accept commissions? Are you a fiduciary?
21. What will the firm do to protect my privacy and identity?

CDFA® questions provided by the Institute of Divorce Financial Analysts (IDFA).

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