MERIT
Financial Advisors

We are committed to guiding and empowering our clients to make knowledgeable decisions that align with personal goals and financial well-being.

During Divorce Offering

- Gather and assess financial assets and liabilities for your statement of net worth/financial affidavit
- Determine and document separate and marital assets
- Locate hidden assets
- Review financial statements and tax returns
- Prioritize personal financial goals and responsibilities
- Review public and private sector retirement plans
- Evaluate employee benefits (including stock options and restricted options)
- Collect, analyze and review insurance policies (Term, Whole Life, Buy-Sell)
- Review executive compensation plans
- Project post-divorce household funding requirements

Post Divorce Offering

- Comprehensive financial planning
- Calendar and plan for important events (stock vesting, changes in alimony, tax payments)
- Create a sustainable spending plan
- Investment analysis and portfolio management to reflect your goals
- Professional team coordination – work with your review counsel, estate planning attorney, accountant and any other members of your team to make sure your plan is working for you
- Evaluate long term care and/or disability policies for you and your ex-Spouse
- Assist with contacting Social Security for benefits when it’s time
- Handle necessary beneficiary changes to retirement plans and insurance policies

Connect With Our Divorce Specialist

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