

FINANCIAL SPECIALIST

Collaborative Law ROLE OF THE FINANCIAL SPECIALIST

Financial Specialists Provide

- Honest and Informative Financial Discussions
- Unbiased Assessment of Financial Position and Cash Flow
- Education – Money Management Skills
 - Budgets
 - Savings & Investment
 - Debt Management

Financial Specialists Build Relationships With Clients

- Discuss Financial Concerns
- Discuss Financial Goals
- Gather and Organize Information
- Analyzes Financial Position
 - Net Worth = Assets – Liabilities
 - Cash Flow – Current and Projections
 - Budgets
- Meet With Clients and Attorneys
 - Settlement Options