The Financial Professional
within the
Framework of Separation
and the
Role of the Financial Neutral

November 16 and 17, 2017
The Neutral Zone
1033 Bay Street,
Toronto, Ontario
M5S 3A5

FPSC CE Approved: Financial Planning (5), Practice Management (5) Product Knowledge (5)

Trainers

Jane Tremblay, CFP, CFDS, CDFA
Financial Transitions Ltd.

Alison Anderson, CFP, FDS
Family Finance Solutions Inc.
Jane Tremblay and Alison Anderson are certified financial professionals with practices dedicated to working with clients going through separation and divorce. Their combined experience of almost 20 years in this role has had them working with well over 400 families in a Collaborative Process as well as many more in Mediation and Traditional Processes.

This two-day workshop will be highly experimental, interactive, involving demos, exercises and role plays, and will cover:

**Day 1 - Knowledge/Attitude and Scope of Role**

*Credits for Day 1 – 3.75 Financial Planning, 3.75 Practice Management*

- Evolution of the Role - From Limited Vision to Full Team Member and the Power of the Neutral
- Scope of role
- Value added support
- When Do You Need a Financial Professional?
- Professional Framework
- Our “Shift” - *What do we want to keep? What do we let go of? What do we want to do differently?*
- Active Listening
- Neutrality: What is Neutrality? Why is our neutrality so important? Concerns and Challenges What we bring consciously and unconsciously to the Process Challenges to Neutrality for the Financial Professional “Engaged” neutrality The Relationship between Neutrality and Advocacy
- Practice Protocols
- CRA and Separation
- Working with legal professionals
- Other practice consideration
Day 2 – Skills Training

Credits for Day 2 – 3.75 Financial Planning, 3.75 Product Knowledge

➢ Tools of the trade

➢ Case Study: Preparing Financial Statements
  Property Settlement Discussions
  Calculation of Support

➢ Income: Determination – What is income for Family Law Purposes?
  Other considerations

➢ Support: Calculating Support
  Using DivorceMate® Tools
  Customizing Support Arrangements

Please complete and return the attached registration form and payment to confirm your space.
Note: Materials and protocols will be provided.
The Financial Professional within Separation

Registration Form

Name: ______________________________________________________

Designations: _______________________________________________

Address: ___________________________________________________

Contact: Email: ______________________________________________

Phone: _____________________________________________________

Early-bird: by October 20, 2017: $695 + H.S.T., for a total of $785.35
After October 20, 2017: $750 plus $97.50 + H.S.T., for a total of $847.50

Either day can be attended for $400 + HST for Early Bird and $425.00 regular
Credit breakdown for each day can be found above.

Cancellation Policy: Up to 3-weeks prior: $50 administration charge
Within 2 to 3-week window: refund of 50%, or transfer to future
course or transfer to another attendee
Within 2 weeks: no refund but may be transferred to future training or
transferred to another attendee

Method of Payment:

Cheque for $_________made payable to Family Finance Solutions Inc. is enclosed

OR

Please charge $______________ to my VISA or MasterCard

Name on card: ______________________________________________

Credit Card No. _________________________ Expiry Date: _____/_____ CCV: ______

Please note that your statement will show payment to Family Finance Solutions Inc.

x____________________________________________________________

Cardholder signature

Please fax to (905)833-7156, e-mail to Alison at alison@alisonanderson.ca, or mail to

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For information, please contact Alison Anderson by email at alison@alisonanderson.ca
or by phone at 416-884-2842.