

*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 experiential, 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<sup>®</sup> 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](mailto:alison@alisonanderson.ca), or mail to***

Family Finance Solutions Inc  
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Toronto, Ontario M5S 3A5

*For information, please contact Alison Anderson by email at [alison@alisonanderson.ca](mailto:alison@alisonanderson.ca)  
or by phone at 416-884-2842.*