TIDAL POINTE
SOUND GUIDANCE THROUGH THE SHIFTING TIDES

FOR REFERRAL PARTNERS
TIDALPOINTE.COM/START-HERE

MAKING THE INTRODUCTION

You do not have to explain what a CDFA is.

Send the attached page and let it do the explaining. Below is when to think of us, what to say when you do, and what happens to your client afterwards.

When to think of us

- A client mentions a separation, even in passing
- Someone asks whether they can afford to keep the house
- A settlement offer is on the table and nobody has run the numbers
- A pension or retirement accounts are being divided
- **A client asks how to get cash out of a retirement account to pay legal fees**
- There is a business, equity compensation, or deferred comp
- One spouse handled all the finances and the other is lost
- The fight is turning into a fight about money

What to say

ADAPT THIS. THE VERSION YOU WOULD ACTUALLY SAY IS BETTER THAN OURS.

Attached is a one-page introduction to Bob Mitton at Tidal Pointe Advisors, a Certified Divorce Financial Analyst. He handles the financial side of a divorce: what assets are actually worth after tax, and what a settlement does to you over the long run. The first conversation costs nothing.

If you are their attorney, add: He does not practice law and he is not a substitute for anything I do. I bring him in because the negotiation is stronger when the numbers underneath it have been properly worked.

If you are their advisor, add: He and I work together on this. He handles the divorce numbers, and I keep running your plan.

What happens next

A conversation of about twenty minutes, at no cost, with no documents to gather first. If the work is not worth it for them we will say so. If it is, they get the scope and the number before committing to anything, so no surprise invoice, which matters to you as much as it does to them.

We work alongside you the whole way. Your client comes back to you with a clean baseline you can plan from and the financial structure already documented.

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Tidal Pointe Advisors LLC provides divorce financial analysis as a Certified Divorce Financial Analyst practice. We do not provide legal or tax advice, and we do not manage investments.