Interviewing Certified Divorce Financial Analysts

Selecting the right Certified Divorce Financial Analyst (CDFA) is crucial, as they'll play a significant role in guiding you through the financial intricacies of divorce. To understand the difference between a CDFA and a Financial Advisor, check out our Bonus Section. Here are some questions to consider when interviewing potential candidates.

Interviewing Certified Divorce Financial Analysts (CDFAs)

01 **Background & Experience:**

- "How long have you been a practicing CDFA? How many cases have you handled?"
- "Can you tell me about your educational background and other relevant certifications?"
- "How many divorce cases have you handled in my situation or similar to mine?"

02 **Specialization & Expertise:**

- "What led you to specialize in financial planning for divorce?"
- "Are there specific types of divorce cases you specialize in (e.g., high-net-worth divorces, divorces with complex assets, businesses, etc.)?"

03 **Approach & Methodology:**

- "How do you typically approach a new divorce case?"
- "What financial software or tools do you use to analyze and project financial scenarios?"

04 **Collaboration with Other Professionals:**

- "Do you collaborate with divorce attorneys, therapists or coaches, business valuators, and forensic accountants? If so, how does that collaboration typically work?"
- "Can you provide references from professionals you've worked with?"
- "Can you work as a third-party neutral?"

05 **Case Outcomes & Testimonials:**

- "Can you share a case study or example (without revealing personal information) where you significantly improved the outcome?"
- "Do you have testimonials or references from past clients?"

CONTINUED...

Interviewing Certified Divorce Financial Analysts (CDFAs)

06 **Communication & Availability:**
- "How often will we communicate or meet during the process?"
- "What's your response time to emails or phone calls?"
- "How do you handle urgent matters?"

07 **Fees & Costs:**
- "How do you structure your fees? Is it hourly, retainer-based, or a combination? Do you offer ongoing support?"
- "Are there any additional costs I should be aware of?"

08 **Post-Divorce Support:**
- "Do you offer post-divorce financial planning or transition support?"
- "How do you help clients adjust to their new financial reality post-divorce?"

09 **Scenario Planning:**
- "How do you handle and present various financial scenarios during negotiations or mediations?"
- "Can you help me understand the long-term implications of different settlement options?"
- "Do you help in financial planning during the separation process?"

10 **Confidentiality & Ethics:**
- "How do you ensure the confidentiality of my financial and personal information?"
- "Can you share your ethical guidelines or code of conduct?"

By asking these questions, you'll get a comprehensive understanding of the CDFA's expertise, approach, and fit for your unique situation. Choosing someone you trust and feel comfortable with is essential, as they'll play a pivotal role in your financial future during the divorce process. Check out the differences between a CDFA and a Financial Advisor in our bonus content below.