WOODWARD CAIRE ADVISORS

FOR FAMILY LAW ATTORNEYS + MEDIATORS

Provide comfort in the face of uncertainty. No cost to you.

The Settlement Assessment shows your client what a proposed division leaves them after taxes, and whether it funds their life afterward. It's free, with no obligation for the client. We don't give legal advice.

WHY SETTLEMENTS STALL

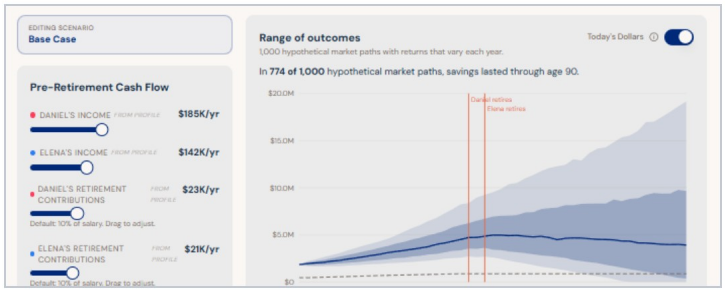
Equal on paper, not after tax.
A $1M 401(k) is not a $1M house.

Keeping the house at any cost.
No math on what it takes to carry it.

Fear of running out.
"Will I be okay on my own?"



Meridien: switch any account or asset in or out of the plan.



Meridien: change any input and see the outcome update.

THE SETTLEMENT ASSESSMENT, BUILT ON MERIDIEN

45 minutes. Back in 3 to 5 business days.

You know the law. We show what a proposal funds. Your client decides with numbers.

1. Map the estate	Meridien, our planning platform, organizes accounts, real estate and debts by owner and presents them in an easy to understand picture.
2. Value each proposal	We walk through what each division is worth once embedded taxes and costs are counted. Not just the financial part, the emotional and sentimental costs, too.
3. Let them test it	Your client switches assets in or out, changes any input, and sees the result.
4. Follow along	You get your own read-only Meridien login, with your client's permission.
If the numbers fall short	You learn it before mediation, along with the amount your client needs.

Fewer stalled cases.
Clients who have seen the numbers are less likely to reopen terms.

We know divorce.
We've been divorced. We've gone through the legal system and understand it.

We stay in our lane.
You handle the law. We handle the planning and investment advice.

Career portfolio managers.
Fee-only fiduciary. Thirty years experience. Matt Caire, CFA, CFP®, CMT.

Introduce a client before mediation.

Or once a proposal is on the table. We're growing quickly and building a small circle of family law attorneys.

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See Meridien

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