



LANDMARK

WEALTH MANAGEMENT

Lindsay Glassman Obtains Her Certified Divorce Financial Analyst (CDFA®) Designation

Landmark Wealth Management and the Institute for Divorce Financial Analysts™ (IDFA™) are pleased to announce that Lindsay J. Glassman, CPA, CFP®, AIF®, CDFA®, Vice President of Advisory Services, in Buffalo, NY, recently completed a specialized educational program in professional divorce analysis and is now a Certified Divorce Financial Analyst® (CDFA®).

Ms. Glassman is trained to provide expertise on the financial aspects surrounding a matrimonial separation. She evaluates the tax implications of dividing property, the financial impact of various settlement options for splitting marital assets (including pensions), child and spousal support payments, and various other marital assets. Lindsay works closely with the client and their attorney in offering valuable insight into the pros and cons of different settlement proposals, providing data to assist decision making and working with both parties to be sure they are aware of common pitfalls.

CDFA® professionals provide the client and attorney with data analysis that shows the financial effect of any given settlement. They become part of the divorce team and provide support on financial issues such as:

- Understanding the short-term and long-term effects of dividing property
- Analyzing pensions and retirement plans
- Determining if the client can afford the marital home and, if not, what he or she can afford
- Recognizing the tax consequences of different settlement proposals

Much of a CDFA® professional's role is collect the client's financial data and perform analysis. CDFAs can help manage a client's expectations of their financial future by presenting different scenarios and talking through the client's budget and expenses. CDFAs are trained to:

- Collect financial and expense data
- Help clients identify their future financial goals
- Develop a budget
- Set retirement objectives
- Determine how much risk they are willing to take with their investments that aligns with their future goals

Founded in 1993, IDFA™ currently has over 2,000 CDFAs across the United States and Canada. The number of professionals receiving the CDFA® designation continues to grow at nearly 15% each year. The designation and this niche industry are expanding rapidly as more people across the country search for alternative divorce processes – from collaborative law to mediation – rather than litigating their case using lawyers as their only line of defense. For more information about IDFA™ or the CDFA® designation, visit www.institutedfa.com.

For more information or any questions, please contact Lindsay Glassman at Landmark Wealth Management:

Lindsay J. Glassman, CPA, CFP®, AIF® CDFA®

Vice President of Advisory Services

Office: 716-630-2443

lindsay@landmarkfirm.com

About Landmark Wealth Management

Landmark Wealth Management is a trusted, independent, registered investment advisory firm dedicated to helping clients reach their financial goals. Our firm works in a fiduciary capacity on behalf of high-net-worth individuals and families, institutions, and non-profit organizations. We focus on portfolio management, retirement planning, tax planning, and estate and generational wealth planning. Our team is credentialed in multiple areas: Certified Financial Planner (CFP), Chartered Financial Analyst (CFA), Certified Public Accountant (CPA), Certified Private Wealth Advisor (CPWA), and Certified Investment Management Analyst (CIMA). The firm is located in Amherst, New York, a suburb of Buffalo.