

# CLASP FINANCIAL NEUTRAL MEMBERS

## AREAS OF SPECIALIZATION



Area of Specialty	Donna Cheswick ADFA®, CDFA®, CQS™	Greg Clark ABV, CPA, CVA	Seth Dresbold CFF®	Mary Ann Ernette CDFA®	Karen Fadzen ADFA®, CDFA®, CFP®, CAS	Alex Kindler ABV, CFF, CPA, CVA, PFS	Donna Kline CDFA®	Julia Kramer CDFA®	Shelly Magri CPA	Derek Smith CPA	Robert Standish CFP®, JD
Gather/Organize Financial Info	X	X	X	X	X		X	X	X	X	X
Prepare Budgets/Lifestyle Analysis	X	X	X	X	X		X	X	X	X	X
Prepare Income/Cash Flow Projections	X	X	X	X	X	X	X	X	X	X	X
Financial Coaching	X			X	X		X	X	X	X	X
Marital Settlement Agreement Consulting	X	X			X	X	X		X	X	X
Marital Analysis/Split Scenarios	X	X	X	X	X	X	X	X	X	X	X
Disposal Income Analysis	X	X	X	X	X	X	X			X	
Social Security Planning	X		X	X	X		X				
Long-Term Care Planning	X		X	X	X		X				
Pre-Divorce Planning	X	X		X	X		X			X	
What if Scenario's	X	X	X	X	X		X			X	
Marital/Non-Marital Tracing/Valuation	X	X		X	X	X	X		X	X	
Executive Compensation Valuation	X	X		X	X	X	X			X	

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Debt Analysis	X	X		X	X	X	X	X	X	X	X
Pension Valuations	X	X	X	X	X	X	X				
Investment Valuations	X	X		X	X		X				X
Investment Research	X		X	X	X		X				X
Investment Consulting	X		X	X	X		X				X
Insurance Analysis/Consulting	X		X	X	X		X				X
Forensic Accounting	X	X		X		X			X	X	
Business Valuations		X				X			X	X	
QDRO Drafting/Preparation	X						X				
Individual Tax Preparation						X		X	X	X	X
Individual Tax Research		X				X			X	X	X
Individual Tax Planning/Consulting		X				X			X	X	X
Corporate Tax Preparation						X			X	X	
Corporate Tax Research		X				X			X	X	
Corporate Tax Planning/Consulting		X				X			X	X	
Estate/Gift Tax Preparation						X			X	X	X
Estate/Gift Tax Research						X			X	X	X
Estate/Gift Tax Planning/Consulting						X			X	X	X

## **EXPLANATION OF CREDENTIALS:**

ADFA = Advanced Divorce Financial Analyst

AIF = Accredited Investment Fiduciary

AVB = Accredited in Business Valuation

CAS = Casualty Actuarial Society

CDFA = Certified Divorce Financial Analyst

CFF = Certified in Financial Forensics

CFP = Certified Financial Planner

CPA = Certified Public Accountant

CQS = Certified QDRO Specialist

CVA = Certified Valuation Analyst

EA = Enrolled Agent

JD = Juris Doctor

PFS = Personal Financial Specialist