

Academic & Professional Qualifications

- CDFA Certified Divorce Financial Analyst.
- Masters in Economics University of California, International Trade, Finance, Accounting.
- Member American Association of Individual Investors, Institute for Divorce Financial Analysts, International Academy of Collaborative Professionals, King County Collaborative Law, Eastside Collaborative Family Law, Seattle Collaborative Family Law, King County Bar Association – Collaborative Law Section, Collaborative Professionals of Washington.
- Financial Management
Investment decision analysis, asset allocation models, financial planning, pension review and estate planning. Registered Investment Advisor Representative. Designed complex financial reporting, analysis and budgeting models for control in different industries. Creation of accounting and business systems to include GAAP, fixed asset, audit, cost, business plans, A/P, A/R, GL, Inv, payroll, taxes, spreadsheet financial and profitability analysis.
- Professional Skills Training
2005 – University of Washington School of Law: Professional Mediation Skills Training Program – Washington Collaborative Law: Collaborative Practice Training – University of Washington School of Law: Family Law Mediation Training for Advanced Mediators.
2006 – Sound Collaboration Collaborative: Team Training – Pierce County Collaborative Law: Interdisciplinary Team Training – NBI: Preventing Critical Financial Mistakes During Divorce.
2007 – Harvard Law School Negotiation Insight Initiative: Advanced Mediation Skills Program & Advanced Negotiation Skills – National Conflict Resolution Center: High Conflict Institute for Family Law Professionals.
2008 – Harvard Law School Program on Negotiation: Advanced Negotiation, Difficult Conversations – Antioch University, Seattle: Mediation Training Program – American Academy of Matrimonial Lawyers: Divorce Law & Federal Taxes.
2009 – Antioch University, Seattle: Divorce & Family Mediation – King County Collaborative Law: Advanced Concepts and Techniques with Difficult Conversations – Antioch University, Seattle: Domestic Violence Screening – Antioch University, Seattle: Advanced Mediation Training – Formation of Seattle Collaborative Law Training & Learning Center.
2010 – Harvard Law School Program on Negotiation: Advanced Negotiation, Difficult Conversations – Seattle Collaborative Law Training & Learning Center programs.
2011 to present – average of 30 + yearly hours.
- Prior Financial Experience
Economist, Financial Planner, CDFA, Miller Advisors, Inc. 1997 – 2005
Settlement Consultant, JMW Settlements Inc. 1989 – 1997
Business Owner, Saltwater Cafe, Inc. 1982 – 1994
Financial Advisor, Merrill Lynch 1976 – 1982
- Prior Training Experience
Introductory Collaborative Law Training – numerous presentations to the greater King, Kitsap and Pierce Counties.
Divorce financial analysis training – King County Bar Association & Washington State Bar Association.
- Collaborative Dissolution Services
 - Financial modeling of property settlement scenarios
 - Historical wage analysis
 - Income tax and cash flow analysis
 - Estimated valuation of pension and retirement benefits
 - Historical budget, temporary and post divorce budgets
 - Child support and spousal maintenance calculations
 - Retirement cash flow analysis
 - House sale tax analysis