OAK TREE MEDIATION
COUPLE, FAMILY, DIVORCE & FINANCIAL MEDIATION
DIVORCE FINANCIAL COUNSELING

Oak Tree
ADVISORY SERVICES, INC.
Helping People See Possibilities...

COLLABORATIVE PRACTICE
Resolving Disputes Respectfully

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The Divorce Tax Checklist: Mistakes Professionals Typically Make

Instructors: Armand D'Alo, EA, CDFA, CFP
Robbin D'Alo, EA, CDFA, CLA

This course addresses the top tax issues that attorneys typically do not cover properly when preparing divorce documents filed with the Court. The class is designed to help tax practitioners navigate the tax rules for divorce, look out for tax traps within settlement agreements, and to protect their divorcing client's interests — as well as their own practice from liability exposures.

Some of the Topics Covered

- Tax Forms to be signed during divorce proceedings
- When $500,000 to him does not equal the $500,000 to her
- Family support vs alimony and child support: traps in support agreements
- QDROs: How they are used and errors to watch for
- Final tax return — joint or separate — and why
- Conflict of interests and releases: The use and problems with them
- Personal residence — when one spouse moves out
- Date of separation: When it happens and what it really means
- Splitting tax breaks
- Splitting prior tax debts
- Splitting personal and mortgage debts
- Innocent spouse issues — and effect on the not-so-innocent spouse

The Learning Objectives: Identify 10 key tax issues that have the most impact on divorcing couples.

Instructor Biographies:

Robbin and Armand D'Alo have been working with families since 1983. From the complexities of taxes and estates, to marriage and divorce and everything in between, they have counseled people to achieve better outcomes in life.

Armand E. D'Alo: Armand is a Certified Financial Planner (CFP®), Certified Divorce Financial Analyst (CDFA™), and an Enrolled Agent (tax professional). He graduated in 1983 from Brigham Young University, where he earned a bachelor's degree in Finance and Family Counseling. He received his CFP® designation in 1986 from the College for Financial Planning in Denver, CO.

He is the author of the book, "The Jump of Your Life: Successfully Navigating the Free-Fall of Divorce and Other Life Traumas," and has taught classes through CPE Link on line, at BYU, UC Irvine, professional conferences, and private groups on the topics of financial planning, taxation, specific divorce tax issues as well as family and financial dynamics in divorce.

Robbin M. D'Alo: Robbin is a Certified Divorce Financial Analyst (CDFA™), an Enrolled Agent (tax professional), and a Certified Legal Assistant (CLA) with membership in NALA (National Association of Legal Assistants – the Paralegal Association).

She holds a bachelor's degree in Business Management from the University of Phoenix and has authored several articles for the Web on divorce and family law matters. She is also a notary public for the State of California.

Both Robbin and Armand are trained in mediation through courses at the National Center for Conflict Resolution (NCRC), with Forrest Mosten and through Pepperdine Law School's program for mediating litigated cases. They are trained educators with the Gottman Institute. Together they produce and co-edit the blog / vlog at oaktreemediation.com and oaktreeadvisory.com and are currently producing a video series on divorce for YouTube.

We hope that this meets the requirements for CEU.

Very truly,

Armand E. D'Alo

Robbin M. D'Alo