Confidently tackling what's next

How we helped a divorcée take stock of her finances, assess her priorities and then forge a path for her future—with clarity and confidence.

MainStreet Wealth Management

Paving the way for a fresh start

- While going through a divorce, our client needed sage advice—and an advisor to help guide her. We helped her formulate a clear, customized plan for her wealth and gain the confidence of knowing she could maintain her lifestyle while also providing for her two daughters.
- By drawing on the insight and experience of specialists across the firm and collaborating closely with the client's external advisors—including CPAs, divorce attorneys and tax attorneys—we were able to ensure a comprehensive and seamless approach.

Challenge

- Our client, who was getting divorced and had little experience setting financial goals or sticking to a budget, needed advice and guidance on how to manage her wealth going forward.
- We helped her assess her priorities and expectations, and then brought in specialists from across UBS to help craft a disciplined, realistic plan that reflects her desire to achieve financial independence and to provide for her two daughters.

Strategy

- Our primary goal was to work with our client to educate and inform her about her financial situation. From there, we helped to develop a holistic, disciplined plan to move her towards her wealth goals and help her maintain her desired lifestyle. Key to this plan was her desire to provide for her two daughters, including their college expenses.
- Using our detailed and highly consultative process, we looked at all aspects of her finances, from mitigating taxes to helping preserve her wealth going forward. We drew in specialists from across UBS to help fine-tune her financial plan and worked in close concert with her external advisors to ensure a thorough approach that kept her interests front and center.
- In the process, she gained insight into her finances and her optimal lifestyle. As her confidence grew, she was able to be more intentional about her financial choices, for today and into the future.

Outcome

- Our client now has a clear road map for her financial future and, with a budget to keep her on track, can enjoy the lifestyle she envisions for herself and her daughters.
- Knowing that our team is committed to working closely with her external advisors (i.e., CPA, attorneys), she can feel confident that she has a team working with her and for her.
- With advisors by her side, our client is now empowered to make informed decisions about her wealth.

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