JILLIAN JONES, MBA, CDFA®

jillianj@supportivedivorcesolutions.com | www.supportivedivorcesolutions.com

EDUCATION

The Institute for Divorce Financial Analysts
Certified Divorce Financial Analyst ® Designation **2017**

St. John Fisher College
Master of Science, Business Administration **2012**
Bittner School of Business (AACSB Accredited)

State University of New York at Geneseo
Bachelor of Science, Business Administration **2008**
(AACSB Accredited)

LICENSES

Insurance Licenses (Various States) **2014 - Current**
Licensed in Life, Accident, Disability, Long Term Care & Health Insurance

Variable Insurance Licenses (Various States) **2014 – Current**
Licensed in Variable Products for Life and Annuity Products

Securities' Licenses (Various States) **2014 - Current**
Series 6 & 63 Securities Licensed, Financial Industry Regulatory Authority (FINRA)

CRIA Registered (Various States) **2015 – Current**
Corporate Registered Investment Advisor, MML Investor Services, LLC, Member SPIC

PROFESSIONAL EXPERIENCE

Financial Planner **2014 - Current**

Comprehensive Fee-Based Financial Planning, Financial Advisement, Brokerage Services, Wealth Management, Asset Allocation Analysis, Mutual Funds, Variable Annuities, Fixed Annuities, Insurance Needs Analysis for Life, Disability, Long Term Care and Health Insurance, Retirement Income Needs Analysis, Evaluation of Cash Flow, Estate Planning, Debt Reduction Strategies, Social Security Filing Strategies, Long-Term Care Planning, College Planning

Owner of Supportive Divorce Solutions, Certified Divorce Financial Analyst ® **2017 - Current**

Comprehensive Divorce Planning Including: Defined Contribution and Defined Benefit Valuation, Facilitate execution of QDROs with advisement on pre and post survivorship options and settlement language, Identify future tax issues, Discover hidden assets and income, Produce powerful case exhibits for court, Creation of alternative financial proposals and "what if" scenarios, Evaluate & Review insurance – Life, Accident, Disability, Long Term Care & Health Insurance, Accurate valuation of property, assets, and liabilities, Preparation of Financial Affidavit, Calculate Spousal and Child Support, Construct Lifestyle Analysis and Post-Divorce Budget, Consultation and Advisement on effects of dividing property, assets and liabilities, Advise on Future Tax Penalties and Capital Gains, Determine current and future expenses related to children; including college expenses, Post-Divorce: Consolidation and/or monitoring of investment and retirement accounts, Examination and Counsel on Will, Power of Attorney, Health Care Proxy, Trusts, beneficiaries on insurance policies, retirement accounts

SERVICES AND CONSULTING

Financial Advisory and Expert Witness Testimony in Court for Divorce **Continual**

Creator & Panel Speaker at Women2Women: Solutions for Navigating Life's Transitions **Continual**

Educator at Rochester City School District for Non-Profit Junior Achievement **2017**

Financial Educator and Presenter for The Establishment New York State **Continual**
"A Guide to Retirement Planning", "Buying Your First Home", "Couples and Money", "Crafting Financial Plans", "Creating a Budget", "Females and Finance", "Investing 101", "Investing 201", "Making Sense of Student Loans", "Parents and Money", "The Bigger Picture of Credit Scores", "Tips and Tricks to Navigating Your Taxes"

Exclusive Employee Assistance Program Certified Divorce Financial Analyst® At University of Rochester Medicine & Subsidiaries **Continual**

BOARDS, COMMITTEES AND PROFESSIONAL ORGANIZATIONS

Member, Financial Specialist
Collaborative Law Association of the Rochester Area **2017 - 2019**

Member
The Institute for Divorce Financial Analysts (IDFA) **Current**

Member
G.R.A.W.A. Greater Rochester Association for Women Attorneys **2017 – 2019**

Certified Divorce Financial Analyst®
Finger Lakes Women in Transition (WIT) **2020 – Current**

Board Member
Rochester Women's Network **2017 – 2020**

Vice President of Revenue Development
Rochester Women's Network **2018 - 2020**

PRESENTATIONS AND PUBLICATIONS

Featured Speaker **October 2019**
Negotiate Your Best Life Podcast with Rebecca Zung
"How Can You be Losing Out on Thousands of Dollars and Not Even Know It"

Contributor **September 2019**
Better After 50.com
"Divorce After 50: 3 Things to Consider About Your Finances"

Contributor **September 2019**
Divorcedmoms.com
"How Divorce is Like Buying a Home"

Contributor **February 2020**
Thrive Global
"The Best Kept Secret of Divorce"

Featured Speaker **February 2019**
Perception is Reality Podcast
"Divorce Doesn't Mean You Have to Lose Everything"

Creator/Featured Speaker **2019**
"Bringing Positive Energy to Divorce"
"Who Gets to Keep the House in a Divorce?"
"How to Spend Your Money After a Divorce"
"What Happens to Lottery Winnings in a Divorce?"
"Child Support Vs. Spousal Support" with guest, Attorney, Jon Bonavilla, Esq
"What is Collaborative Law?"
"What a Divorce Costs"
"How Divorce is Like Buying a House" with guest, Attorney, Jon Bonavilla, Esq
"What You Should Know About Moving Out During a Divorce"
"When to Go to Court" with guest, Attorney Jon Bonavilla, Esq
"How a CDFA and an Attorney Work Together During a Divorce" with guest, Attorney, Jon Bonavilla, Esq
"What is The Average Cost of Divorce?
"Who Needs Financial Advice During Divorce?"
"Sometimes We Need to Have Tough Conversations"
"Why I became a Realtor After Divorce" with guest, Licensed Realtor, Rachel Wexler
"Being Your Best Self in the Stretch Zone" with guest, Certified Life Coach, Linda Heeler
"Being There to Help During Difficult Time" with guest, Business Owner, Lauren Goetz
"Buying and Selling a House During a Divorce" with guest, Licensed Realtor, Rachel Wexler
"Easing the Burdens of the Sandwich Generation" with guest, Business Owner, Lauren Goetz
"Understanding the Child Tax Credit"
"Avoiding Burnout with Time Management" with guest, Business Owner, Lauren Goetz
"Divorce and Family Therapy" with guest, Licensed Realtor, Rachel Wexler
"How I Find Hidden Assets During a Divorce"
"Self-Care and Emotions" with guest, Certified Life Coach, Linda Heeler
"Using Experts for Your Divorce"
"The Difference Between and Advocate and a Neutral" with guest, Licensed Realtor, Rachel Wexler
"The Real Costs of Using Experts"
"When to Downsize Your Home During Divorce"
"Understanding Imputed Income"
"Valuing a Home During Divorce" with guest, Licensed Realtor, Rachel Wexler
"Handling Finances During Divorce"
"The Dangers of Caregiver Burnout" with guest, Business Owner, Lauren Goetz
"Preparing for Your Second Marriage with a Pre-Nup"
"Why You Shouldn't Sell Your House Yourself" with guest, Licensed Realtor, Rachel Wexler
"How to Split Up Debt in Divorce"