

The Value of a CeFT®

Financial guidance for when life changes, not just when the numbers do.

A major life transition can affect how you think, feel, decide, and plan. A CeFT® professional brings specialized training to the human dynamics of financial change, helping you navigate both the personal and financial sides of transition at a thoughtful pace.

1. Make decisions at the right pace

Organize and prioritize what needs attention now, what can wait, and which decisions deserve more time.

2. Connect your money to what matters

Clarify your values, priorities, and what life may look like next so money decisions support the whole picture.

3. Build confidence through change

Break complex decisions into manageable steps, creating structure and helping rebuild confidence during uncertainty.

4. Coordinate the transition

Work alongside your attorney, CPA, and other trusted professionals so the financial plan reflects the realities of the transition.



Members of our team hold a range of industry certifications, including:

CFP®
CERTIFIED
FINANCIAL
PLANNER®

CeFT®
Certified Financial
Transitionist®

RLP®
Registered Life
Planner®

FBS®
Certified Financial
Behavior Specialist®

CDFIA®
Certified Divorce
Financial Analyst®

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