

Financial Mediation Services

Overview

As well as pre-settlement reporting and post-settlement advisory services, **Julie Lavers and Sarah Demmon** is able to offer Financial Mediation Services to family lawyers and their clients.

Perhaps a couple of brief outlines of cases where we have been instructed to carry out Financial Mediation will help to illustrate what can be achieved.

Case 1 - The first case was instructed as the wife was adamant she would hang on to the family home, and the husband could use all his pensions to buy himself a house. This is not an unusual situation but rarely is it the only or most ideal solution.

The husband was actually living in a bedsit and paying the mortgage on the Former Matrimonial Home and in reality his life was on hold.

Through mediation Julie was able to 'deconstruct' all the financial assets and explain in concise terms how each worked.

The wife finally realised that a £1 of pension is not the same as a £1 of house, and she has now agreed to downsize so husband can buy a place of his own where his children can come and stay.

Case 2 - To illustrate a different approach, this case was all about agreeing and explaining which asset was best in whose hands. In this case there were a number of complex pensions schemes, and involved a professional couple with dependent children. Julie was able to explain the advantages and disadvantages, clearly demonstrating the best way to share these pensions to ensure dependants' pensions were retained – taking full account of the fact that sometimes dependents pensions can be lost on sharing. Whilst this couple were very motivated to reach agreement, they were unable to resolve a fairly complex situation and they were very grateful that the mediation sessions had made sense of it for them.

Julie and Sarah are passionate about helping people resolve their issues in a palatable and non-confrontational atmosphere. They are both Chartered Financial Planners with huge experience in financial services and are technically competent advisers available as a financial neutral to assist family lawyers.



To speak to Julie or Sarah about Financial Mediation Services or Pre/Post-Settlement reporting -

Please contact us

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“Intelligent, Independent Financial Advice”

All information has been prepared with care to ensure accuracy and is based upon our understanding of legislation and HMRC practice, which can be subject to change. This is intended to provide information only and should not be considered as advice.

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