

# HCR Wealth Advisors Managing Director Michelle Katzen Earns CDFA® Certification

*By earning a CDFA® certification, Michelle Katzen, Managing Director at HCR Wealth Advisors, adds to her portfolio to better assist HCR Wealth Advisors' clients*

LOS ANGELES, CALIFORNIA, UNITED STATES, September 15, 2020 /EINPresswire.com/ -- After passing the required exam, Michelle Katzen, Managing Director of [HCR Wealth Advisors](#), became a Certified Divorce Financial Analyst® professional in August, which will allow her to provide greater assistance to clients with financial issues associated with a pending divorce.

Divorce Financial Planning is the application of the discipline of financial planning to settlement strategies in divorce. The process requires the synthesis of tax, insurance, retirement, and other areas of knowledge with their specific application to divorce.

With this certification, Katzen, who is also a Certified Financial Planner™ professional, expands her portfolio and experience to better assist HCR Wealth Advisors clients who are seeking financial advice in connection with a potential dissolution.

"I am very happy to have passed the CDFA® exam after many months of work to complete the coursework," said Katzen. "I am excited to share my knowledge and experience to help my clients, who, unfortunately, may find themselves planning for or in the midst of a divorce. My goal and hope is to serve as a trusted resource to these clients and provide comfort and relief to them during this often challenging time."

By relying on a CDFA® certificant, those in the midst of a divorce are more likely to receive advice and information that can help them make smart decisions during a difficult period of their lives. Financial advisors who are CDFA® professionals are knowledgeable in all financial issues that can arise in a divorce in ways that a judge, mediator, or lawyer may not be.

Some of the specific tools acquired through the CDFA® certification program include, among other things, a comprehensive understanding of divorce law, marital vs. separate property,



Michelle Katzen, CFP®, CDFA®



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*Michelle Katzen*

valuing and dividing property, splitting the family home, spousal and child support, and various tax issues and solutions that may stem from dividing assets, such as stock.

To be eligible to take the CDFA® exam, Katzen was required to hold a Bachelor's degree and have three years of relevant work experience in financial planning.

While Katzen has already provided innumerable benefits to

clients of HCR Wealth Advisors, this CDFA® certification will propel her growth at the company, along with promising client comfort, even in difficult transitions.

Katzen [joined](#) HCR Wealth Advisors in 2014. She previously worked for Toyota Financial Services, Union Bank, and UBS Financial Services. She earned her B.S. in Mathematics, with minors in Statistics and Business from Colorado State University and a Master's of Financial Engineering from UCLA Anderson School of Management. While working for Toyota, Katzen took an active role in securing the company's first Green Bond, which secures funding for environmental causes.

About HCR Wealth Advisors: HCR Wealth Advisors is a [California-based](#), comprehensive financial planning firm that puts the well-being of their clients first. Started in 1988, the company relies on its own method of financial planning called The Clarity Formula® to promise comfort in economic turmoil, life changes and more. HCR Wealth Advisors understands that each individual will have a unique life, and one, basic financial plan may not fit all lifestyles as they change. That's why the company prioritizes specialized plans for each client, from estate management to philanthropy. The best part? Each personalized financial road map prepares for possible economic crisis.

Alyssa Phillips, Chief Operating Officer

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