Christopher K. Winn, CFP® MBA CDFA™
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DIVORCE TRIAL CONSULTANT – EXPERT WITNESS
CERTIFIED DIVORCE FINANCIAL ANALYST™

Overview

Christopher K. Winn is a fee-only financial planner with more than 15 years' experience. He is a CERTIFIED FINANCIAL PLANNER™ professional and is among the 1 percent of advisors nationally to have taken the NAPFA fiduciary oath to always act in his clients' best interests. His practice focuses on individual comprehensive financial planning with a specialty in divorce planning and analysis. (Comprehensive financial planning helps clients reach their goals and objectives by analyzing their current net worth, cash flow, taxes, investments, retirement, education, insurance and estate planning needs.)

Mr. Winn has worked with over 100 post-divorce financial planning clients since 1997. In 2010, Mr. Winn started offering pre-divorce planning services as a trial consultant to attorneys and financial mediator to families going through divorce. As a Certified Divorce Financial Analyst™, Mr. Winn helps his clients understand the short and long term financial implications of proposed divorce settlements. For example, he may review, analyze and consult on:

- How income and capital gain taxes will impact their proposed property divisions
- Tax implications of spousal and child support
- Understanding pension valuations, QDROs and retirement plan divisions
- Tracing marital property and separate property
- Lifestyle Analysis to support alimony claims

Education/Credentials
NAPFA Registered Financial Advisor
National Association of Personal Financial Advisors, Arlington Heights, IL – 2013
Continuing Education requirement of 60 hours every two years.

M.B.A in Finance *with high honors*
South University, Savannah, GA – 2012

Licensed Oregon Life/Health Insurance Consultant
Oregon Insurance Division, License Number 4798206 - 2011

Certified Divorce Financial Analyst™
Institute of Divorce Financial Analysts, Durham, NC -2010
Continuing Education requirement of 15 hours every two years.

CERTIFIED FINANCIAL PLANNER™ professional
CFP Board, Denver, CO – 2003
Continuing Education requirement of 30 hours every two years.

Bachelor of Science in Business Administration
Portland State University, Portland, OR – 1988

Experience
Interactive Wealth Advisors, Inc. Portland, OR 2013 to present
Fee-only Financial Planner/President
Company founder of Registered Investment Advisory firm. Responsible for the strategic direction of firm as well as servicing and growing individual financial planning and investment clients. Completed requirements and coursework to upgrade to NAPFA Registered Financial Advisor from NAPFA Corporate membership in 2013. Recognized as a *Five Star Wealth Manager* in Portland Monthly Magazine in 2013.

Confluence Wealth Management/CMC Advisors Portland, OR 2011 - 2013
Fee-only Financial Planner
Senior planner at the firm. Responsible for new business development, investment analysis, insurance consulting, on-going client service, due diligence and complex financial planning. Collaborated with firms' partners on complex cases in the areas of divorce, investment valuations, insurance and real estate. Served on the firm's marketing and investment committee. Recognized as a *Five Star Wealth Manager* in Portland Monthly Magazine in 2011 and 2012. Completed MBA with high honors in 2012.

Ameriprise Financial Beaverton, OR 2005 - 2011
Financial Advisor
Franchise owner responsible for new business development, investment analysis, on-going client service, due diligence and complex financial planning. Full profit and loss responsibility. Advanced training in Behavioral Finance from The Lennick-Aberman Group completed in 2009. Awarded CDFA™ designation in 2010.

CUSO Financial Hillsboro, OR 2000 - 2005

Financial Advisor

Senior Financial Advisor at the firm. Nationally recognized by *Bank Investment Consulting* magazine. Award winning achievements for production, client satisfaction and business practices. New advisor mentor/coach. Awarded CFP® designation in 2003.

Prudential Securities Portland, OR 1997 - 2000

Financial Advisor

Received more 200 hours of training covering sales, investments, financial planning, public speaking, insurance and retirement planning.

Active Professional Associations

Institute of Divorce Financial Analysts (IDFA)
National Association of Personal Financial Advisors (NAPFA)
Estate Planning Council of Portland
Oregon Entrepreneurs Network (OEN)

Hourly Fee Schedule:

Consultation and Preparation	$160.00/hr.
Travel Time	$ 80.00/hr.
Court, Mediation, Arbitration and Hearing	$225.00/hr.
Staff:	
Administration	$ 75.00/hr.