

Just What the Doctor Ordered

By the time “Sarah” decided to reach out to Steve Kaplan, she had already tried mediation to settle her difficult divorce. The mediation had failed and the client and her spouse were heading toward a court trial – a process that is nearly guaranteed to be both emotionally and financially draining. Looking to provide their client with the highest level of financial advice, Sarah’s attorneys recommended she seek additional input from Steve Kaplan.

“I interviewed two settlement oriented professionals whose work even in litigation is targeted toward settlement before trial,” she reports. “The minute I met Steve Kaplan I knew he was a perfect fit for my situation. First off, he works in a solo practice where I knew there would be no ‘red tape’ as problems arose – and problems did arise, BIG TIME. Regardless of the situation, Steve always responded in a timely manner.”

Despite the difficulties, Sarah knew she had an ally who was up to the job. “Steve had to interview and endlessly remind my ex-husband (a CPA himself) of what missing documents were required and how my ex’s statements contrasted with provided documentation. It was obvious that Steve understood accounting as well as, if not much better than, my ex-husband.”

She also observed that her early assessments of Steve’s professionalism were correct. “I discovered that Steve was philanthropic. It suggested, and turned out to be true, that Steve is beyond reproach as ethics and fairness go.”

In the end, Sarah got the results she had hoped for. “Steve is at the cutting edge of his craft. He stays current with changes in tax and divorce law. Steve and my lawyers built a solid case with documentation and settlement recommendations that allowed us to stop short of a court trial. I feel quite fortunate to have had him in my corner.”

Throughout a very stressful time, Sarah had the support she needed to achieve her goal and put this difficult chapter of her life behind her. Many people going through a divorce will be able to relate to Sarah’s succinct description of her experience working with Steve: “Better than medication!”

Due to the very sensitive nature of Steve’s work, client names in the following case studies have been changed to protect their privacy.