

Cindy S. Gleason, CFP® ChFC CDFATM
Certified Divorce Financial Analyst™/ Mediator
Gleason Resource Group
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Cedar Falls, IA 50613
Phone: 319-234-0199
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CURRICULUM VITAE

Education:

Upper Iowa University, Fayette, IA
Bachelor of Science, 1988

The American College, Byrn Mawr, PA
Chartered Financial Consultant, 2003

Certified Financial Planner Board of Standards, Inc.
Certified Financial Planner®, 2004

Institute for Divorce Financial Analysts, Southfield, MI
Certified Divorce Financial Analyst™, 2005

Sovern Mediation, LLC, Cedar Rapids, IA
Family Law Alternative Dispute Resolution Training, 2006

Community/Organizational Service

President, Business & Professional Women/Iowa	2012-2013
President, Warren County Economic Development Corporation	1996
Citizen of the Year, Milo, IA	1995
Warren County Leadership Institute – Charter Board Member	1994

Employment:

Gleason Financial Group, Cedar Falls, IA Certified Financial Planner®/Investment Advisor Representative	2002 to Present
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Gleason Resource Group, Cedar Falls, IA Certified Divorce Financial Analyst™/Mediator	2005 to Present
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Iowa Bank, Bellevue, IA Investment Representative/Financial Planner	2000 to 2002
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Personal Financial Planner/Owner Indianola, IA	1990 to 2000
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Experience: Over two decades of comprehensive financial services experience with expertise in financial issues of divorce, mediation, financial planning, retirement planning, tax planning and estate planning. Expertise includes:

- Assisting clients and attorneys in understanding the financial implications of various divorce settlement options
- Analyzing and preparing comprehensive financial information for affidavit preparation
- Providing expert testimony in divorce proceedings
- Educating clients about complex financial issues upon which they must make decisions during divorce and mediation
- Participating in settlement meetings either as an advocate or neutral
- Mediation for parties who need particular expertise in the financial areas of their divorce
- Collaborative mediation with attorney teams who understand the need for the financial neutral in the traditional collaborative model
- Mediation services as a Roster mediator in the Sixth District
- Providing comprehensive financial planning services and wealth coaching for financial planning clients throughout Iowa, Arizona, New York, Ohio, Minnesota and New Mexico
- Provide adult education on issues of financial planning at Hawkeye Community College and University Book and Supply and as a requested guest speaker. Classes taught: Smart Women Finish Rich; Smart Couples Finish Rich; Start Late Finish Rich or subjects of specific interest to a group or organization

Educational Presentations:

- 40 Hour Family Law Alternative Dispute Resolution required training and CLE for attorneys/mediators in the Fifth Judicial District of Iowa – Co-wrote and co-taught curriculum including mediation of financial assets with Kimberly Stamatelos, Attorney/Mediator - Des Moines, IA October 29-November 2, 2012
- Guest speaker and lecturer at numerous local conferences. Topics included: Financial Impact of Divorce; Smart Women Finish Rich; and Using a Financial Expert in Divorce **Audience:** Linn County Family Law Group
 - Iowa Business & Professional Women's Annual Conference
 - NE Iowa Regional Business & Professional Women's Spring Conference
 - Cedar Valley Professional Women's Resource Group
- Guest lecturer – **Speaking of Women's Health**, Waterloo Iowa 2007
Topic: Your Financial Fitness and Major Life Events
- Developed and presented CLE/CPE Credit program provided for attorneys and CPA's in northeast Iowa regarding the tax implications of 1031 exchanges – 2006
- Developed and presented CPE Credit to CPA's: **Advanced Tax Strategies** – 2007

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- Developed and presented with attorney and life coach quarterly **Navigating Divorce** workshops in Des Moines
- Continuing Legal Education Program to attorney/mediators – **Analyzing the Tax Return in Divorce and Mediation Cases** – 2008, Des Moines, Iowa

Continuing Education:

- Institute for Divorce Financial Analysts Advanced Workshop
Philadelphia, PA October, 2005
Topics: Working as the Neutral; Stock Options, Retirement & Divorce;
Forensic Accounting Aspects of Divorce; Reviewing Opposing QDRO's;
Working with High Net Worth Cases
15 hours Continuing Education
- Institute for Divorce Financial Analysts Advanced Workshop
San Antonio, TX February, 2006
Topics: Healthcare Coverage & COBRA in Divorce; QDRO's – Key Concepts
and Drafting; Understanding the Divorce Decree; The Attorney/CDFA
Partnership; Courtroom Basics
15 hours Continuing Education
- Institute for Divorce Financial Analysts Advanced Workshop
Las Vegas, NV June, 2007
Topics: Advanced Case Studies; QDRO Drafting; Advanced Tax Considerations in
Divorce; Legal Process & Bankruptcy; The Financial Expert in Collaborative
Law; Stock Options & Retirement in Divorce; Working as the Neutral
15 hours Continuing Education
- Roster Mediator Orientation – Cedar Rapids, IA November, 2007
Sixth Judicial District Family Mediation Program
- Mediation Services of Eastern Iowa & Sixth Judicial District February, 2008
Family Mediation Program
Topic: What You Want to Know About Current Issues and Changes in Family
Law Case Processing
4 hours Continuing Education; .5 hours ethics
- Institute for Divorce Financial Analysts Advanced Workshop
Las Vegas, NV October, 2008
Topics: Serving as the Expert Witness; Preparing Financial Exhibits; Executive
Compensation; Utilizing Insurance and Trusts in Divorce
16 hours Continuing Education
- What You Need to Know Re: CSRU 101 & Mediation and Your Practice May, 2009
Cedar Rapids, IA
6 Hours Roster Mediator Continuing Education

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- Institute for Divorce Financial Analysts National Conference

- Chicago, IL August, 2009
 Topics: Legal Process of Divorce; E-Discovery; Bankruptcy and Divorce; QDRO Essentials; Insurance and Trusts in Divorce; QDRO Drafting; Mediation: Acting as the Neutral
 18 hours Continuing Education
- Family Law Mediation Programs for Iowa – Des Moines, IA November, 2009
 Topics: Preparing Yourself for Mediation; Getting the Information You Need
 5 hours Continuing Education
 - No More Pies – Chart and Figure Technical Analysis Training November, 2009
 Philadelphia, PA
 - Mediation and Domestic Violence – Cedar Rapids, IA December, 2009
 Topics: Identifying and Responding to Patterns of Domestic Abuse Before and During Mediation
 7 hours Continuing Education
 - Institute for Divorce Financial Analysts Advanced Symposium February, 2010
 Las Vegas, NV
 Topics: Tracing Funds in a Matrimonial Case; Managing High-Conflict Clients; Hot Financial Topics in Family Law; Prenuptial Agreements and Privilege; Advanced Case Study
 14 hours Continuing Education
 - Dorsey Wright Advance Technical Analysis Institute, Richmond, VA March, 2010
 Advanced Technical Securities Analysis
 - No More Pies – Chart and Figure Technical Analysis Training II September, 2010
 Baltimore, MD
 - Institute for Divorce Financial Analysts Advanced Symposium February, 2011
 Tampa, FL
 Topics: Same Sex Divorce & Domestic Partnerships; Special Needs—Special Divorce; Advanced Taxation Issues in Divorce; Financial Oversights within the Divorce Decree; Bankruptcy & Divorce-Advanced Issues
 19 hours Continuing Education
 - Institute for Divorce Financial Analysts National Conference September, 2012
 Chicago, IL
 Topics: Providing Direct Service to Clients; A View from the Bench; Tax-Effectuated Property Division; Finding Hidden Money through Forensics; Working as a Financial Neutral; Charitable Trusts and Private Foundations in Divorce-Advanced Tax and Estate Planning Strategies; Determining the Right Business Model
 16 hours Continuing Education
- Consistently exceed 30 Continuing Education credits bi-annually on divorce and financial planning topics including estate planning, investment strategies and income tax strategies and divorce.