

FOR REFERRAL SOURCES

A trusted resource for sophisticated referrals.

When a client you have served for years faces a complex divorce, the referral is personal. It requires care.

Beth works with trusted professionals who need confidence that their clients will be heard, protected, and guided with discretion, judgment, and a clear strategy.

The right referral protects the client relationship.

Referral sources often know their clients before a divorce is visible to anyone else. A wealth manager may see financial concerns emerging. An estate planning attorney may recognize planning issues that could be affected by divorce. A therapist or divorce coach may understand the emotional complexity of the family system. A business advisor may see how personal decisions could affect company stability.

Beth understands that a referral is not simply a name passed along. It is an extension of trust. She approaches that responsibility with discretion, responsiveness, and respect for the professional relationships already in place.

When the matter calls for more than a standard referral.

Beth is best suited for matters where family-law issues intersect with wealth, privacy, parenting, business interests, or sophisticated advisory planning. Referral sources often involve Beth early, before a client is ready to take visible action, or when the client needs to understand options before making a decision.

A careful handoff, handled with discretion.

Referral sources are often protecting long-standing relationships. Beth's role is to give the client the legal judgment and family-law strategy they need while respecting the trust that already exists between the client and the referring professional.

Where appropriate and authorized, Beth coordinates with advisors so the legal strategy reflects the broader financial, personal, and family context.

When a client's life spans cities, states, or countries.

Beth works from Chicago with referral sources whose clients live, work, and hold assets across the country and abroad. High-net-worth divorce may involve advisors in multiple cities, assets in different jurisdictions, business interests with national reach, trusts, and privacy concerns that require careful coordination.

Her work is a natural fit for referral sources who serve private clients with complex family, financial, and professional lives.

For the professionals clients already trust

Financial advisors and wealth managers

Clients with significant assets often need family-law counsel who understands how divorce may affect liquidity, asset allocation, business interests, retirement planning, and long-term financial security.

Estate planning attorneys and trust professionals

Divorce can intersect with trusts, inheritance, estate plans, family wealth structures, and beneficiary designations. Beth's work is especially relevant when family-law strategy must account for planning structures already in place.

Therapists and divorce coaches

Family-law matters often involve emotional complexity, parenting concerns, conflict dynamics, and children's well-being. Beth values a thoughtful, child-aware approach and understands the importance of steady guidance.

Accountants and business advisors

When divorce may affect business ownership, professional practices, compensation, tax planning, or company stability, Beth helps clients understand the family-law implications and coordinates with the appropriate professionals.

Attorneys and professional peers

Beth is a resource for attorneys whose clients need sophisticated family-law counsel, whether the issue involves divorce planning, complex financial matters, child-related concerns, or privacy-sensitive circumstances.

QUESTIONS ADVISORS ASK

The practical side of a referral.

Wealth managers, estate planning attorneys, accountants, therapists, and divorce coaches often ask me the same practical questions before they refer a client. Here are my answers.

When is the right time to refer a client?

Usually sooner than it feels comfortable. The signals tend to appear before anyone says the word divorce: a client asks how a particular account is titled, wants to understand what is separate and what is shared, moves an inheritance into their own name, or stops wanting both spouses at the meeting.

A financial advisor often sees it first in the numbers. A therapist or divorce coach often hears it first in the room. At that stage, my role is not to start a case. It is to make sure your client does not make a decision in the next few weeks that limits their options for the next twenty years.

My client hasn't decided to divorce yet. Should they still call?

Yes. Some of the most valuable conversations I have are with people who are still deciding. A first meeting is confidential, it does not start anything, and it often makes the decision itself clearer.

One question I ask early: "On a scale of one to ten, with ten being you are ready to proceed today, what number would you assign?" A three and an eight need very different advice, and both deserve it before anything is filed.

What is the best way to introduce a client?

The simplest way is to give your client my office's contact information and let them reach out directly. If your client would like you to make the introduction, email my office with the subject line "Confidential Referral," and include only your client's name, your relationship to them, and the general nature of the concern.

Please do not forward financial statements, emails, or other details yet. My office first has to confirm there is no conflict of interest, and until an engagement is in place, the less that travels by email, the better for your client. From there, Erin Feldman in my office will reach out to your client quietly and arrange a first conversation.

Will you work with the advisors my client already has?

Yes, and I would much rather build on that relationship than replace it. The wealth manager who knows the portfolio, the estate planning attorney who drafted the trusts, the accountant who knows ten years of tax returns: each of them sees part of the picture I need.

One thing to think about early is whether an advisor has worked with both spouses. In that situation, the advisor may need to consider their own professional obligations before continuing with one spouse alone, and it helps to sort that out before the divorce becomes contentious.

Will I stay informed after the referral, with the client's permission?

With your client's permission, yes, to the degree that it helps the client. Some referring professionals want only to know the introduction was made. Others, such as a financial advisor modeling settlement options, need to stay closely involved.

What I can share depends on what your client authorizes, and sharing information with people outside the legal team can affect whether certain communications stay protected. So we decide at the start who will be included, on what topics, and how. That way you are never left guessing, and your client's privacy is never compromised.

What if my client has homes, companies, or trusts in other states or countries?

When you refer that kind of matter, the most useful thing you can tell me early is where things sit: homes, operating companies, holding entities, trusts and their governing law, retirement accounts, and where the children live and attend school.

That map shapes the first strategic decisions, including where a case could or should be filed and which professionals need to be involved in each place. I coordinate with counsel in other jurisdictions, and with you, so the client experiences one strategy rather than several disconnected ones.

These answers are general information for referring professionals and are not legal advice.

Make a discreet introduction.

If you are advising a client who may need Beth's counsel, a brief, confidential call with her office is the simplest way to begin.

Erin Feldman, Legal Assistant and Intake

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Subject line: "Confidential Referral"

Please do not send confidential or time-sensitive information before conflicts are cleared and an attorney-client relationship is established. Representation is subject to formal engagement procedures.

Contacting Beth's office does not create an attorney-client relationship. Representation is subject to conflicts checks and formal engagement procedures.