

Amy J. Bouchie, CFP[®], CDFP[™]
Financial Advisor
CERTIFIED FINANCIAL PLANNER
Practitioner[™]

1033 Mt. Pleasant Rd., Suite A
Evansville, IN 47725

Phone: 812.618.9050 Fax: 812.618.9059
e-mail: ab@newhorizonsfc.net

CURRICULUM VITAE

EDUCATION & DESIGNATIONS:

Purdue University, West Lafayette, IN
Bachelor's Degree in Financial Counseling and Planning, 1989

College of Financial Planning, Denver, CO
Certified Financial Planner[®], 1999

Institute for Divorce Financial Analysts, Durham, NC
Certified Divorce Financial Analyst[™], 2008

LICENSES:

Series 7 – General Securities Representative, Series 63 - The Uniform Securities Agent State Law Examination, Life, Accident, Health, and Variable Annuity Insurance, and Long-term Care Insurance

EMPLOYMENT:

New Horizons Financial Consultants, Evansville, IN May 2013 to Present
Certified Financial Planner[®], Certified Divorce Financial Analyst[™], and Financial Advisor

Ameriprise Financial, Evansville, IN April 1992 to May 2013
Certified Financial Planner[®], Certified Divorce Financial Analyst[™], and Financial Advisor

EXPERIENCE:

Over 21 years of experience in financial services industry with knowledge regarding:

- *Financial Issues of Divorce* - Assisting clients to understand the short- and long-term financial implications of various divorce settlement options as well as helping them manage investments after the divorce is finalized
- *Comprehensive Financial Planning* – Helping clients plan their futures and making sure they are financially sustainable during retirement as well as other transitional periods, such as divorce or death of a spouse
- *Investment Analysis and Management* – Deciding which investments are appropriate for each client, taking into consideration many factors including: risk tolerance, time horizon, and age
- *Survivor Income Planning* – Making sure clients' families are protected financially in the event of client death or disability
- *Retirement Income Strategies* – Deciding which investment vehicles are appropriate streams of income for each client during retirement, taking into consideration factors including: risk tolerance, time horizon, age, and income needs and sources
- *Estate Planning Strategies* – Helping clients pass on assets after death or disability to ensure the estate is dissolved according to their wishes

CONTINUING EDUCATION:

- *Tracing Financial Assets*
Institute for Divorce Financial Analysts
- *Financial Oversights within the Divorce Decree*
Institute for Divorce Financial Analysts
- *Divorce and Mortgages*
Institute for Divorce Financial Analysts
- *QDROs Level I Essentials*
Institute for Divorce Financial Analysts
- *Lifestyle Analysis Financial Reports*
Institute for Divorce Financial Analysts
- *Special Needs: Special Divorce*
Institute for Divorce Financial Analysts
- *Executive and Deferred Compensation*
Institute for Divorce Financial Analysts
- *Private Investigators in Divorce and Custody*
Evansville Bar Association
- *Division of Assets Update*
Evansville Bar Association
- *Retirement Plans in Divorce*
National Business Institute

PROFESSIONAL MEMBERSHIPS:

- Financial Planning Association, FPA
- Institute for Divorce Financial Analysts, IDFA
- Association for Divorce Financial Planners, ADFP