Paraplanning Services

SAVE TIME

Let us take care of data entry, administration, and developing financial plans for you – freeing up valuable time for you to nurture your client relationships and grow your practice.

FULLY INDEPENDENT

Divergent Financial Planning is fully independent and not aligned with any financial institution, insurance company, trust company, or agency. We do not sell any financial products, mitigating conflicts of interest. As fiduciaries, we always act in the best interests of your clients.

RETAIN OWNERSHIP

Our paraplanning engagements allows your firm to maintain full control and ownership of your client relationships, leveraging the impact of having a CFP® as a part of your team.

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Divergent Financial Planning offers paraplanning services for professional firms such as law firms, accounting firms, and other financial planning firms.

We assist with developing comprehensive and holistic financial plans for their clients, taking care of administrative tasks, data analysis, and plan recommendations.

Benefits for Your Firm

- Create added value for your clients by offering a comprehensive financial planning crafted with a Certified Financial Planner®. Covering Financial Management & Cash Flow, Retirement Planning, Investment & Wealth Planning, Risk Management & Insurance, Tax Planning, Estate Planning, and Business Succession Planning, your clients will have a strong blueprint for their financial future.

- Divergent Financial Planning specializes in Estate Planning – with expertise in developing trends including digital assets, capacity questions, and multi-partner relationships. Let us gather the details for your client's estate planning needs, reducing time spent for lawyers to draft wills, powers of attorney, personal directives, and other legal documents.



DREW ADAMICK, CFP® has over 10 years of experience providing professional financial advice and planning for Canadians. With experience as a Personal Representative, licensed investment adviser, and insurance agent, Drew can confidently provide the highest quality advice for your firm and your valued clients.

Drew and Divergent Financial Planning work on a fee-for-advice-only basis, accepting no commissions or referral fees.