



(<http://dfmwealth.com>)

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YEARS OF COMBINED INVESTMENT EXPERIENCE

0

YEARS OF AVERAGE CLIENT TENURE

WHO WE ARE

DFM is an independent investment advisory and financial planning firm that has been counseling successful individuals, families, and businesses since 1986.

Welcome to Diversified Financial Management

Diversified Financial Management (DFM) is a dynamic, fee-only financial planning and investment advisory firm. Our experienced professionals provide customized solutions for high net worth individuals, families, and institutions.

The firm is headquartered in Norwell, Massachusetts, and serves clients across the country.

Diversified Financial Management is registered with the Securities and Exchange Commission (SEC) as an independent investment advisor.

Please call Calvin Place at (781) 792-0440 or e-mail us at dfm@dfmwealth.com (<mailto:dfm@dfmwealth.com>) with any questions or to arrange an introductory meeting.



MEET OUR TEAM



[\(http://dfmwealth.com/our-team/\)](http://dfmwealth.com/our-team/)

H. Calvin Place Jr. CFA (<http://dfmwealth.com/our-team/>)

PRESIDENT



[\(http://dfmwealth.com/our-team/\)](http://dfmwealth.com/our-team/)

Mark J. Everett (<http://dfmwealth.com/our-team/>).

MANAGING DIRECTOR, FINANCIAL ADVISOR



[\(http://dfmwealth.com/our-team/\)](http://dfmwealth.com/our-team/)

Sharon Wall (<http://dfmwealth.com/our-team/>)

FINANCE AND OPERATIONS



[\(http://dfmwealth.com/our-team/\)](http://dfmwealth.com/our-team/)

Carole Walsh (<http://dfmwealth.com/our-team/>).

CLIENT SERVICE

REQUEST A FREE CONSULTATION

Fill out the form below to arrange for a free initial consultation.

Name *

Phone *

Email *

Message *

SEND REQUEST

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A Registered Investment Advisor
with the Securities and Exchange Commission.