INNOVATIVE FINANCIAL PLANNERS & INVESTMENT PROFESSIONALS

Financial advisers finally providing tangible value.

Wondering if your adviser is providing real value? So are we.

COMPARE YOUR ADVISER

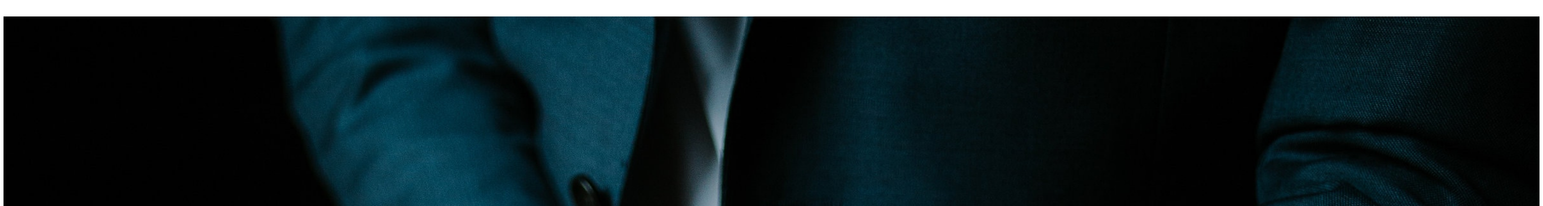
INTERVIEW US TODAY

Consider your current adviser relationship

Does it include...

A FAMILY CFO

...who is a CERTIFIED FINANCIAL PLANNER™ professional and will facilitate all facets of your custom tailored and comprehensive Divergent Wealth Signature Plan.




DIVERGENTWEALTH®
Changing how people engage with advisers

Coordination with an Estate Planning Attorney

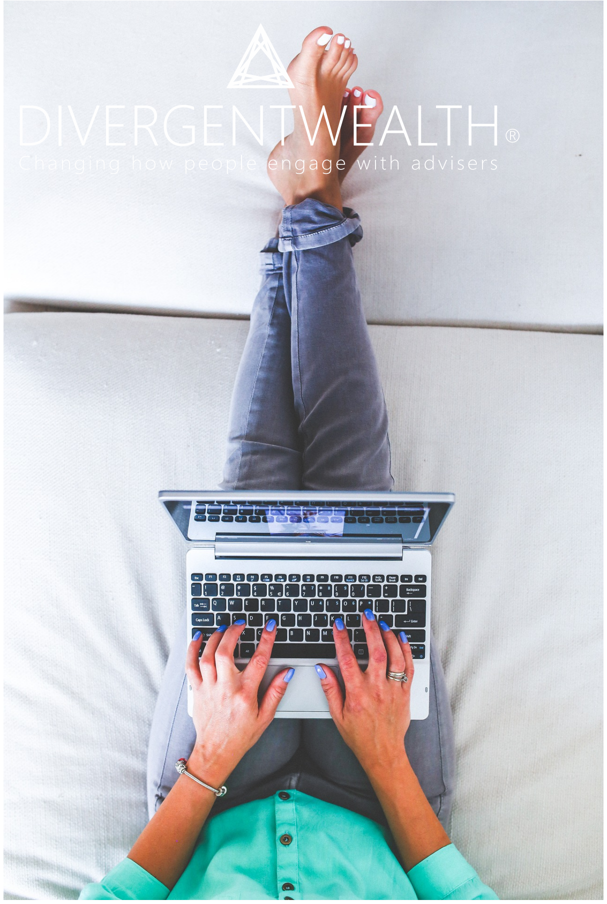
...resulting in a collaborative effort to align your Estate Plan with your comprehensive financial plan.

Interactive Financial Planning & Modeling

... defined and created with a team of professionals and is accessible in real-time through a personal financial planning portal.

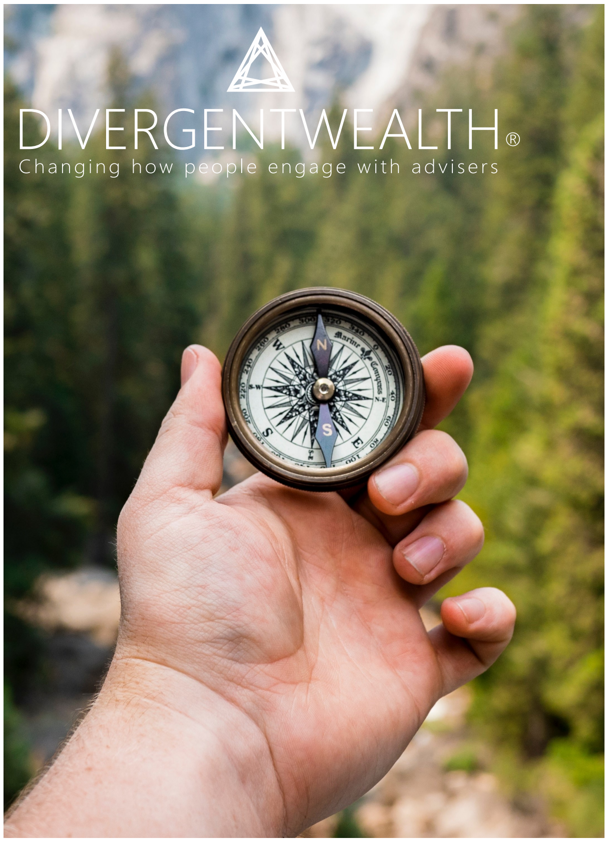
Transparent Performance

… with a client portal featuring your accounts, allocation, and performance on the landing page.



A digital Archive for Legacy Planning

… assisting you in organizing, securely storing, and strategically sharing your most important information with your loved ones.



A legal Fiduciary

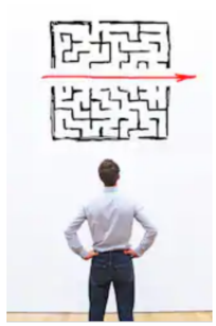
… a fiduciary is someone who has a legal responsibility to act in your best interest. Working in this arrangement should be non-negotiable.

A Dedicated Relationship Manager

…who is detail-oriented and follows up with you after completing important tasks. Your Implementation Specialist.

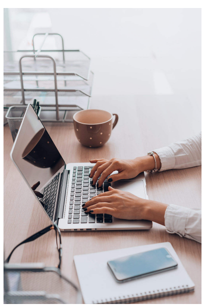
Coordination with a Tax Professional

…resulting in effective tax planning ensuring your Tax Strategy is in sync with your comprehensive financial plan.



An elegantly Simple Investment Strategy

… that is principled and process driven resulting in an investment approach that is easy to understand and articulate.



A Client Friendly Website

… that is simple to navigate, rich in informative content, and provides a client portal with access to important financial tools.

Client relationships that span generations

... a time-tested and trusted financial partner is a rare commodity. When found, it can be shared with those you love most.

A thoughtful processes

... a comprehensive financial plan is only as good as the people and processes created to build, track, and adapt it. We love building repeatable processes, and we are good at it.

INTERVIEW US

DOWNLOAD ONE OF OUR FREE GUIDES

3 Things You Must Know About Investment Fees

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SCTLibrary®

5 Ways To Maximize Your Social Security

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