



Paraplan
— OnDemand —

Precision, reliability, and support

when advisors need it most.

Comprehensive financial plans.
Delivered **when you need them.**



ACCURATE
AND RELIABLE



DETAIL-ORIENTED
PLANNING



ADVISOR
FOCUSED



COMPREHENSIVE
ANALYSIS



EXPERT
SUPPORT

Comprehensive financial plans. Delivered **when you need them.**

SERVICES DESIGNED TO SUPPORT YOUR PRACTICE

Flexible solutions. Accurate work. Advisor-focused.



DATE ENTRY ONLY

For advisors who need clean, accurate plan setup without analysis.

This service focuses strictly on data organization and entry within financial planning software. We ensure all client information is structured properly and ready for advisor review.

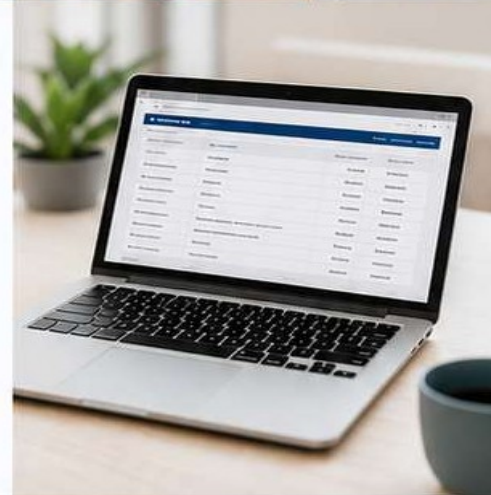
INCLUDES

- ✓ Client data entry into planning software
- ✓ Account organization and balance verification
- ✓ Income and expense inputs
- ✓ Asset and liability structuring
- ✓ Data formatting for plan readiness



IMPORTANT:

This tier does not include analysis, modeling, or recommendations. It is designed for advisors who prefer to run their own planning scenarios but want to outsource the administrative work.



FOUNDATIONAL PLAN

A foundational financial plan designed to establish a clear retirement baseline.

This service includes the full setup of the planning file and the development of a core retirement projection to help advisors evaluate the client's long-term outlook.

INCLUDES

- ✓ Full plan setup in planning software
- ✓ Data organization and verification
- ✓ One core planning scenario
- ✓ Baseline retirement projections
- ✓ Initial modeling framework for advisor review



This tier is ideal when an advisor needs a quick, structured starting point for planning conversations.



COMPREHENSIVE PLAN

A deeper planning engagement that supports more complex financial situations and broader client needs.

This service expands the baseline plan to incorporate multi-disciplinary planning considerations, allowing advisors to review a more complete financial picture.

INCLUDES

- ✓ Retirement and cash flow analysis
- ✓ Basic tax planning analysis
- ✓ Investment planning review
- ✓ Insurance needs review
- ✓ Estate planning considerations



Comprehensive plans may vary in scope depending on client complexity.



ADD-ONS

Advisors often need deeper insights into specific planning strategies. Optional add-ons allow you to expand a plan without committing to a full comprehensive engagement.

AVAILABLE ADD-ONS

- ✓ Roth conversion analysis
- ✓ Social Security optimization
- ✓ Stock option strategy modeling
- ✓ Additional scenarios and what-if projections
- ✓ Business planning analysis
- ✓ Custom advisor requests



Add-ons can be applied to any plan level.



HOW IT WORKS

A streamlined process designed to help advisors outsource planning while maintaining full control of the client relationship.



SECURE & CONFIDENTIAL

Client information is handled with professional standards of confidentiality and care.



FLEXIBLE SUPPORT

Support tailored to your firm's workflow, planning needs, and engagement scope.



ADVISOR OWNED

You maintain control of recommendations, client communication, and implementation.



CLIENT FOCUSED

Spend more time strengthening relationships while we handle the planning work.



PROFESSIONAL DELIVERABLES

Clear, organized, presentation-ready reports built to support advisor recommendations.



RESPONSIVE SERVICE

Reliable communication and support throughout the planning process.

WHY ADVISORS OUTSOURCE PLANNING

Today's advisors are expected to deliver comprehensive, high-quality plans—while running a business, growing relationships, and staying compliant.

Outsourced planning support gives you the capacity, consistency, and confidence to do more for your clients—without adding headcount.



THE BENEFITS FOR YOUR PRACTICE



SAVE TIME

Reclaim hours spent on data gathering, modeling, and report creation. We handle the behind-the-scenes work so you can focus on what matters most—your clients.



INCREASE CAPACITY

Take on more clients without adding staff. Outsourced planning gives you the bandwidth to grow your practice strategically and sustainably.



DELIVER CONSISTENT, HIGH-QUALITY PLANS

Provide comprehensive, professional plans that reflect your process and standards—every time. Consistency builds trust and strengthens client relationships.



STAY FOCUSED ON RELATIONSHIPS

You're the relationship manager and trusted advisor. We support you behind the scenes so you can spend more time where you add the most value.



REDUCE OVERHEAD

Avoid the cost, time, and complexity of hiring, training, and managing in-house staff. Get enterprise-level support without the added overhead.



FLEXIBLE WHEN YOU NEED IT

Whether you're experiencing growth, seasonal demand, or a staffing transition, we provide flexible support that scales with your needs.



OUTSOURCE THE WORK. NOT THE RELATIONSHIP.

You maintain full control of the client relationship, recommendations, and advice. We're your planning partner—working behind the scenes to help you deliver more value, to more clients.

- ✓ More time for what matters
- ✓ More capacity to grow
- ✓ Stronger plans and better outcomes
- ✓ Happy clients and a more efficient practice

SOFTWARE & PLANNING CAPABILITIES

Built around efficient workflows, structured planning processes, and advisor-ready deliverables.




eMoney

Our primary planning platform used for:

- ✓ Retirement modeling
- ✓ Cash flow analysis
- ✓ Roth conversion analysis
- ✓ Insurance analysis
- ✓ Estate planning observations
- ✓ Scenario modeling
- ✓ Advisor-ready reporting

eMoney serves as the core planning platform for Paraplan OnDemand, allowing us to build comprehensive, organized financial plans with clear reporting and streamlined workflows.



Excel & Supplemental Analysis

Used for:

- ✓ Custom calculations
- ✓ Planning comparisons
- ✓ Scenario testing
- ✓ Data organization
- ✓ Additional supporting analysis

Excel is used to support customized calculations, additional planning comparisons, and supplemental analysis when needed.

PLANNING CAPABILITIES



Retirement Planning

Detailed retirement projections and goal analysis.



Roth Conversion Modeling

Evaluate and compare Roth conversion strategies.



Cash Flow Analysis

Understand cash flow today and throughout retirement.



Estate Planning Observations

Identify key estate considerations and opportunities.



Insurance Reviews

Analyze existing coverage and identify potential gaps or overlaps.



Current vs. Proposed Comparisons

Side-by-side analysis of strategies and outcomes.



Advisor-Ready Deliverables

Professional, clear reports designed for client presentation.



Organized Planning Workflows

Structured processes and templates ensure consistency and efficiency.



ADVISOR RESPONSIBILITY. ADVISOR FOCUS.

Advisors maintain full responsibility for recommendations, client communication, and final plan delivery. Paraplan OnDemand provides analytical and planning support designed for advisor review.

ABOUT US

Flexible support. Reliable results.
Built for advisors, by a CFP® professional.

Paraplan OnDemand was built with flexibility at its core, for both advisors and the firms they serve.

Founded in Pittsburgh, a city known for its work ethic and professional resilience, Paraplan OnDemand was built on the idea that strong planning support should be reliable, adaptable, and easy to integrate into an advisor's existing workflow.



OUR STORY

Paraplan OnDemand was created at the intersection of family, flexibility, and financial planning.

After years working as a CFP® professional across multiple financial institutions, it became clear that planning demands don't always align neatly with staffing models. Advisors often need reliable support during periods of growth, transition, or temporary gaps without committing to permanent overhead.

Paraplan OnDemand was built to provide flexible paraplanning support that adapts to an advisor's practice while preserving their role as the primary decision-maker and client relationship manager.



Based in Pittsburgh, Paraplan OnDemand is built on reliability, flexibility, and a commitment to supporting advisors behind the scenes.



ABOUT THE FOUNDER



Founder David Cawley graduated from the University of Pittsburgh at Johnstown with a Bachelor's degree in Finance and Accounting and went on to earn multiple industry licenses, including the CERTIFIED FINANCIAL PLANNER® (CFP®) designation.

While at UPJ, he was also a collegiate wrestling All-American and Academic All-American, experiences that helped shape the discipline and work ethic he brings to his work today.

SECURITY & CONFIDENTIALITY

Protecting your data. Respecting your trust.

We understand the sensitive nature of financial information and maintain strict safeguards to ensure your data stays secure and confidential.



HOW WE PROTECT YOUR INFORMATION



DATA SECURITY

All data is stored and transmitted using encrypted, industry-standard protocols to help protect your information from unauthorized access.



ACCESS CONTROLS

Information is accessed only by authorized team members who require it to perform their responsibilities. We follow strict internal access policies.



CONFIDENTIALITY FIRST

We treat your data with the highest level of confidentiality. Your client information is never shared, sold, or used for any purpose outside of providing support to you.



SECURE WORK ENVIRONMENT

Our team works in a secure environment with best practices for device security, network protection, and identity verification.



SECURE FILE SHARING

We use secure, encrypted file sharing methods to exchange documents and information safely and efficiently.



DATA RETENTION & DISPOSAL

We retain information only as long as needed to deliver services and in accordance with applicable laws and then securely delete or dispose of it.



REGULAR TRAINING

Our team receives ongoing training on data privacy, security best practices, and compliance standards.



COMPLIANCE MINDED

We follow industry best practices and strive to align with applicable privacy regulations, including SEC and FINRA guidelines for advisory support.



OUR COMMITMENT TO YOU

We are committed to maintaining the security, integrity, and confidentiality of your information—so you can focus on serving your clients with confidence and peace of mind.

- ✓ We protect your data as if it were our own.
- ✓ We respect your clients and your business.
- ✓ We support you behind the scenes, securely and discreetly.
- ✓ You stay in control—always.



Advisors maintain full responsibility for recommendations, client communication, and final plan delivery. Paraplan OnDemand provides analytical and planning support to help deliver complete, advisor-ready solutions.

LET'S WORK TOGETHER

We're here to provide the planning support you need—so you can focus on what matters most: your clients.

Have a question or ready to get started?
We'd love to hear from you.



CONTACT INFORMATION



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BUILT FOR ADVISORS. FOCUSED ON CLIENTS.

We work behind the scenes to deliver high-quality plans, thoughtful analysis, and reliable support—so you can lead with confidence.



LET'S SCHEDULE A CONVERSATION

Whether you have questions, need more information, or are ready to get started, we're just a message or call away.



READY TO PARTNER?

We're ready when you are.
Let's make planning easier—together.



Paraplan
—OnDemand—