



**Identify strategic partnership opportunities for Archevi in Canada. Evaluate financial advisors, estate lawyers, insurance agents, and senior care organizations. Include outreach approach and value proposition for each.**

Now I'll create the comprehensive strategic partnership report.

## **Strategic Partnership Opportunities for Archevi in Canada**

### **Executive Summary**

Archevi is positioned to capture significant market share through strategic partnerships with four primary professional service provider segments in Canada: **financial advisors** (30,000+ practitioners), **estate lawyers** (8,000+ practitioners), **insurance agents** (25,000+ life/long-term care specialists), and **senior care organizations** (500+ providers). The combined addressable market spans over 60,000 professionals serving millions of Canadian families facing document organization and care coordination challenges.

The partnership strategy employs a **three-tiered approach** (Referral → Co-Marketing → White-Label) allowing partners to grow engagement progressively while Archevi scales from low-cost customer acquisition through strategic market penetration. Early focus should target **Ontario, British Columbia, and Quebec**, where market density is highest and professional networks are most developed.

**Estimated Year 1 Partnership Revenue Potential: \$300,000–\$750,000 CAD** through 50–100 active referral partners, scaling to multi-million dollar annual recurring revenue (ARR) within 3 years as co-marketing and white-label partnerships mature.

### **Market Context: Why Now?**

Several macro trends create urgent demand for Archevi among Canadian professionals:

**Demographic Imperative:** Canada's aging population is accelerating wealth transfer planning. Over CAD 1 trillion in assets are expected to transfer from baby boomers to younger generations within the next decade. Nearly 20% of Canadians are aged 65+, with projections indicating one in four Canadians will be seniors by 2030.<sup>[1] [2] [3]</sup>

**Estate Planning Market Growth:** The Canadian estate planning service market is projected to grow from USD 10.56 billion (2024) to USD 22.84 billion by 2033 at a CAGR of 9.5%. However, a critical bottleneck exists: approximately 61% of Canadians lack a legal will, and those who do arrive at lawyers' offices unprepared. <sup>[4]</sup> <sup>[5]</sup>

**Professional Service Gaps:** Current state of professional practice reveals systematic inefficiencies:

- 87% of estate lawyers send draft documents to clients, but only 10% use visualization techniques to help clients understand their wills<sup>[6]</sup>
- Financial advisors report that 65% of wealth management firms expect AI to improve client personalization in the next 1–2 years<sup>[7]</sup>
- Senior care intake processes remain fragmented, with critical health and legal documentation scattered across families<sup>[8]</sup>

**Partner Motivation:** Professionals across all segments recognize that better tools for document organization and family collaboration directly improve client outcomes and practice efficiency. Investment in technology partnerships is no longer optional but essential to competitive positioning.

## Partner Segment 1: Financial Advisors

### Market Size & Opportunity

Canada has approximately **30,000 independent financial advisors**, managing assets under advisement averaging \$300+ million for top performers and \$226.8 million industry-wide as of December 2024. The wealth management technology market is experiencing rapid consolidation, with advisors actively seeking integrated solutions for client engagement, retirement planning, and estate coordination. <sup>[9]</sup> <sup>[10]</sup> <sup>[11]</sup>

**Geographic Concentration:** Ontario (highest), British Columbia, Alberta, and Quebec host the largest advisor populations. <sup>[12]</sup>

### Primary Pain Points

Financial advisors face two interconnected challenges:

1. **Client Information Fragmentation:** Clients arrive at planning meetings with documents scattered across email, file folders, and cloud storage. Advisors waste 5–10 hours per client gathering and organizing estate, insurance, and financial information before meaningful planning conversations can occur.
2. **Estate Planning Coordination Gaps:** While most advisors recognize the importance of holistic financial planning (retirement, tax, estate, insurance), they lack a unified system to document client wishes, organize documents, and ensure families understand the overall plan. This creates friction with estate lawyers and family members post-death.

3. **Next-Generation Client Expectations:** Affluent clients (especially Gen X and millennials inheriting wealth) expect digital-first, transparent planning experiences. Generic document management (Google Drive, Dropbox) feels unprofessional for high-value advisory relationships.

## Archevi's Value Proposition for Financial Advisors

**"Help your clients arrive prepared. Archevi organizes your clients' critical documents before your planning meeting, saving you 5–10 hours per complex client case while positioning your firm as the trusted hub for family financial coordination."**

Specific value drivers:

Value Dimension	Benefit	Financial Impact
<b>Time Savings</b>	Pre-populated client document library reduces intake time from 8–10 hours to 1–2 hours	Save \$400–500 per client (at \$50–60/hour advisor rate)
<b>Service Differentiation</b>	Ability to offer white-glove document intake and family dashboard to HNW clients	Justifies higher advisory fees; improves retention
<b>Multi-Generational Planning</b>	Involve adult children in planning conversations early; document transition plans	Increases AUM through family accounts; reduces succession disputes
<b>Compliance &amp; Documentation</b>	Automatic tracking of client wishes, decisions, and document versions	Reduces liability risk; supports advisor notes for compliance files
<b>Estate Lawyer Partnerships</b>	Coordinate seamlessly with estate lawyers; share organized documents at will-drafting stage	Improves client satisfaction; differentiates from competing advisors

## Ideal Partner Profile

**Target: Mid to large advisory firms (AUM \$500M+) and TAMP-affiliated advisors**

Archevi resonates most strongly with:

- Independent advisors or boutique firms wanting to differentiate on service quality
- TAMP-managed advisors seeking co-marketing partnerships for practice growth
- Advisors with significant high-net-worth (HNW) or family office client bases
- Firms actively modernizing tech stacks and integrating with multiple platforms<sup>[13]</sup>

**Geographic Priority:** Toronto (largest advisor concentration), Vancouver, Calgary, Montreal.

## Revenue Model: Financial Advisors

### Tier 1 – Referral Partnership (Initial)

- **Structure:** Archevi pays 15–20% of first-year subscription revenue per referred client

- **Mechanics:** Advisor recommends Archevi to clients during planning intake. Client signs up via advisor referral link. Archevi credits advisor account monthly.
- **Example:** Advisor refers 5 clients → 3 convert to Archevi Family plan (\$108/year) = \$160 first-year commission (15% of \$108 × 3 × 12 months, divided)
- **Engagement Level:** Low (minimal support required from Archevi)
- **Timeline to Revenue:** 1–3 months after referral

## **Tier 2 – Co-Marketing Partnership (Growth)**

- **Structure:** Revenue share model. Archevi pays 5–8% of ARR generated from referred clients annually
- **Mechanics:**
  - Joint webinars on "Family Financial Organization" or "Estate Planning Prep" (2–3 per quarter)
  - Co-branded case studies and practice guides
  - Archevi featured in advisor's client materials and website
  - Advisor given exclusive white-label dashboard URL for own branding
- **Example:** Advisor's referred clients generate \$5,000 ARR → Advisor receives \$250–400 annually per cohort
- **Engagement Level:** Medium (5–10 hours/month required for webinars, content collaboration)
- **Timeline to Revenue:** 3–6 months to see meaningful cohort from co-marketing

## **Tier 3 – White-Label Enterprise (Scale)**

- **Structure:** Full platform licensing + revenue share
- **Mechanics:**
  - Advisor firm resells Archevi as proprietary "Client Information Hub" under their branding
  - Archevi provides white-label platform, dedicated support, and custom integrations
  - Revenue split: Advisor firm keeps 40%, Archevi retains 60% (negotiable for large firms)
  - Minimum commitment: 20 seats/clients annually
- **Example:** Advisor firm with 100 clients adopts white-label model. 20% penetration = 20 clients on Family Plus plan (\$19/month) = \$4,560 annual ARR. Advisor firm receives \$1,824 (40%), Archevi receives \$2,736.
- **Engagement Level:** High (ongoing integration, support, marketing required)
- **Timeline to Revenue:** 6–12 months to full deployment, ongoing recurring revenue

## **Go-to-Market Approach: Financial Advisors**

### **1. Industry Conference & Association Presence (Months 1–3)**

- Target: Investment Executives (IE) Report Card participants, Advisor Council forums, IMCA (Investment Management Consultants Association) conferences
- Tactic: Booth presence, sponsor educational session on "Digital Estate Planning for HNW Families"
- Outcome: Pre-identify 20–30 advisors for cold outreach

### **2. Direct Outreach to TAMP Partners (Months 1–2)**

- Identify major TAMP/custodian platforms (Osaic, Cetera, Raymond James Canada) and schedule partnership meetings
- Pitch: White-label integration to offer advisors differentiated client onboarding
- Benefit to TAMP: Helps advisors save time on practice management, improves client retention<sup>[14]</sup>

### **3. LinkedIn-Based Targeting (Ongoing)**

- Search for: Financial advisors with 200+ client households, recent content on estate planning or family wealth transfer
- Message: Personalized outreach showcasing Archevi's time-savings case study for their practice
- Content: Share case studies from first 5–10 advisor partners showing time/revenue impact

### **4. Practice Management Software Partnerships (Months 2–4)**

- Approach CRM and practice management providers (Redtail, Black Diamond, Advisor360) with co-marketing proposal
- Goal: Archevi featured as recommended integration in onboarding; affiliate commission structure

### **5. Referral Partner Onboarding Program (Month 3+)**

- Create 30-minute "Introduction to Archevi" video and self-serve dashboard for advisors
- Provide: Co-branded one-pager, client invitation email template, FAQ, success metrics tracking
- Enablement: Monthly advisor webinar on new Archevi features and partnership wins

## **Specific Outreach Template: Financial Advisors**

**Subject: Help your HNW clients arrive prepared for planning conversations**

[Advisor Name],

*I noticed your firm specializes in estate and family wealth planning for high-net-worth clients in [region]. We've found that one of the biggest time drains for advisors is the intake phase—*

*gathering client documents and getting clients to think through their wishes before the first planning meeting.*

*Archevi is a Canadian SaaS platform that helps families organize their critical documents (wills, insurance policies, financial records, healthcare directives) in one searchable AI-powered knowledge base. Our advisors using Archevi report saving 5–10 hours per complex client case.*

*I'd like to show you how [competitor/adjacent firm in region] is using Archevi to differentiate their practice. Three options:*

- 1. Short conversation (15 min): I'll show you a live demo and our advisor success metrics*
- 2. Trial with 3 clients: You refer 3 clients during your next planning cycle; we waive the fee for your trial*
- 3. Co-marketing partnership: We run a joint webinar on "Estate Planning Prep" and share leads*

*Which interests you most?*

*[Your Name]*

*Archevi Partnership Team*

*[partnership@archevi.ca](mailto:partnership@archevi.ca)*

## **Partner Segment 2: Estate Lawyers**

### **Market Size & Opportunity**

Canada has approximately **8,000 estate law practitioners**, with the estate planning service market experiencing rapid growth. Over CAD 1 trillion in asset transfers are projected in the next decade, yet only about 39% of Canadians have a will. This creates massive unmet demand in estate planning services.<sup>[15]</sup>

**Estate Planning Practice Challenges:** The 2024 estate practice report surveyed over 100 estate lawyers and found:

- Average fee for a will is CAD 1,380 (up from prior years)
- 87% of lawyers send draft documents to clients, yet only 10% use visualization to help clients understand their wills<sup>[16]</sup>
- The highest barriers to new client acquisition are referrals (50% of lawyers cite this) and lack of effective marketing (only 5% rely on advertising)<sup>[17]</sup>

**Geographic Concentration:** Ontario has the highest concentration of estate lawyers, followed by British Columbia and Quebec.

## Primary Pain Points

Estate lawyers face three critical challenges:

- 1. Client Preparation & Intake Efficiency:** Clients typically arrive unprepared, lacking organized financial and healthcare information. Lawyers must spend hours gathering details (bank accounts, insurance policies, healthcare wishes, digital assets) before they can draft meaningful documents. This reduces billable planning time and increases overall case timelines.
- 2. Client Understanding & Compliance:** Despite best efforts, clients often don't fully understand their wills, trusts, or powers of attorney. This creates post-signing disputes, family conflicts, and potential liability claims. Only 10% of firms use visualization tools to improve client comprehension.<sup>[18]</sup>
- 3. Multi-Professional Coordination:** Estate lawyers work in isolation from financial advisors, accountants, and insurance professionals. When clients move between professionals, information gaps create inefficiencies and missed opportunities for comprehensive planning.
- 4. Document Management & Version Control:** Managing drafts, client feedback, and final versions is manual and error-prone, especially for complex estates involving multiple jurisdictions or assets.

## Archevi's Value Proposition for Estate Lawyers

**"Help your clients arrive with organized documents. Archevi provides the single source of truth for client documents, reduces intake time by 6–8 hours per client, and gives families a lasting record of your planning work."**

Specific value drivers:

Value Dimension	Benefit	Financial Impact
<b>Intake Efficiency</b>	Pre-populated client document library; AI-powered search replaces manual file digging	Save 6–8 hours per complex estate case (CAD 600–800 at typical billing rates)
<b>Client Comprehension</b>	Share organized documents during meetings; clients understand their plan better	Reduce post-signing disputes; improve client satisfaction scores
<b>Family Coordination</b>	Clients invite family members to organize documents before/after planning	Reduced follow-up calls; clients arrive with family alignment on wishes
<b>Multi-Professional Handoff</b>	Export organized documents to share with financial advisors, accountants, tax counsel	Improve reputation as "quarterback" of estate planning; increase referrals
<b>Document Longevity</b>	Clients keep organized documents post-will (healthcare wishes, insurance, digital assets)	Ongoing relationship; future updates and reviews; practice growth
<b>Risk Management</b>	Automatic version history and audit trail; document proof of client wishes	Reduce liability exposure; documentation for disputes

## Ideal Partner Profile

**Target: Solo practitioners and mid-size law firms (5–20 lawyers) focused on wills, estates, and family law**

Archevi resonates most strongly with:

- Boutique estate law practices emphasizing client service quality
- Lawyers with significant elder law or family wealth planning practices
- Firms looking to differentiate on technology and client experience
- Lawyers wanting to expand services without adding headcount (practice leverage)

**Geographic Priority:** Toronto (largest market), Ottawa, Vancouver, Calgary.

## Revenue Model: Estate Lawyers

### Tier 1 – Referral Partnership (Initial)

- **Structure:** Archevi pays 20–25% of first-year subscription revenue per referred client
- **Mechanics:** Lawyer recommends Archevi to clients as part of intake process. Client signs up via lawyer referral link. Archevi credits lawyer's account monthly.
- **Example:** Lawyer refers 10 clients/year → 6 convert to Archevi Family+ plan (\$19/month = \$228/year) = \$342 first-year commission (25% of \$228 × 6), with ongoing recurring commissions of \$137 annually per client
- **Engagement Level:** Low (integration into intake process only)
- **Timeline to Revenue:** 1–3 months after referral

### Tier 2 – Co-Marketing Partnership (Growth)

- **Structure:** Revenue share model. Archevi pays 8–10% of ARR generated from referred clients annually, plus co-marketing support
- **Mechanics:**
  - Joint webinars on "Preparing Clients for Estate Planning" or "Digital Asset Management in Wills" (2–3 per quarter)
  - Co-branded practice guide: "Client Preparation Checklist for Estate Planning"
  - Archevi featured in lawyer's intake materials and client communication
  - Lawyer given exclusive white-label intake portal (e.g., "Smith & Associates Client Document Center")
  - Monthly reporting on referrals, conversion rates, and partnership ROI
- **Example:** Lawyer's referred clients generate \$3,000 ARR → Lawyer receives \$240–300 annually per cohort
- **Engagement Level:** Medium (5–10 hours/month for webinars, content, portal management)
- **Timeline to Revenue:** 3–6 months to meaningful client cohort

### Tier 3 – White-Label Enterprise (Scale)



- **Structure:** Full platform licensing + revenue share
- **Mechanics:**
  - Law firm white-labels Archevi as proprietary "Client Document Organizer" or "[Firm Name] Client Portal"
  - Archevi provides: white-label platform, API integration with practice management software (Unity, eState Planner), dedicated support, compliance documentation
  - Revenue split: Law firm keeps 35–40%, Archevi retains 60–65% (negotiable based on firm size and integration depth)
  - Minimum commitment: 10–15 active clients annually; 1-year contract with renewal option
- **Example:** 20-lawyer firm adopts white-label. 25% client adoption = 50 clients on Family Plus plan (\$19/month = \$228/year). Law firm revenue =  $\$50 \times \$228 \times 35\% = \$3,990$  annually. Archevi revenue =  $\$50 \times \$228 \times 65\% = \$7,410$  annually.
- **Engagement Level:** High (integration, marketing, ongoing support required)
- **Timeline to Revenue:** 6–12 months to full deployment

## Go-to-Market Approach: Estate Lawyers

### 1. Law Society & Professional Association Engagement (Months 1–4)

- **Target:** Ontario Bar Association (OBA) Trusts & Estates Law Section (led by Kathryn Balter, current Chair), Quebec Bar Association, Law Society of British Columbia
- **Tactic:** Sponsor CLE/CPD programs on "Digital Estate Planning" or "Client-Centered Practice Technology." Present case studies from early partner lawyers.
- **Outcome:** Direct access to 500+ estate-focused lawyers; credibility through professional endorsement

### 2. Practice Management Software Partnerships (Months 2–4)

- **Approach:** Unity Accounting (esilaw), eState Planner, other law firm practice management platforms used by Canadian estate lawyers
- **Goal:** Archevi featured as recommended client intake/document management solution; affiliate revenue share
- **Benefit:** Advisors see Archevi as native integration to their existing systems

### 3. Direct Outreach to Identified Law Firms (Months 2–3)

- **LinkedIn Search Strategy:** Search for estate lawyers in target cities who have published blog posts on digital assets, client intake, or family communication
- **Firms Identified** (from research): Miller Thomson LLP (Nicole Woodward), Kimel Law Group (Katherine Kimel), Hull & Hull, Bader Law, Eisen Law, Nihan Law, J. Solomon Law
- **Outreach Angle:** "We noticed your firm published '[Digital Assets in Wills]' – we're building the tool to help clients before they arrive at your office. Let's talk about co-marketing."

### 4. Content Marketing & Thought Leadership (Months 1–6)

- **Create:** Free downloadable "Estate Planning Client Preparation Checklist" (positioning as tool lawyers can give clients)
- **Distribute:** Legal blogs (All About Estates), LinkedIn, estate lawyer forums
- **CTAs:** "Get your client checklist + try Archevi free for 14 days"
- **Goal:** Warm leads of lawyers and clients before direct outreach

## 5. Referral Partner Onboarding Program (Month 3+)

- **Create:**
  - 30-minute video: "How to Integrate Archevi into Your Client Intake Process"
  - White-label intake form template (can be branded with law firm logo)
  - Client invitation letter (pre-written, customizable)
  - Monthly success metrics dashboard
  - Quarterly "Lawyer Partner" webinar with case studies and product updates
- **Support:** Dedicated Archevi person available for integration questions, technical support

## Specific Outreach Template: Estate Lawyers

**Subject: Reduce intake time by 6–8 hours per estate client**

[Lawyer Name],

*I came across your recent article on "[Digital Assets in Wills]" and noticed you're thinking deeply about how clients should prepare for estate planning. We're building a tool to solve exactly that problem.*

*Archevi is a Canadian SaaS platform that helps families organize their critical documents (wills, insurance, financial records, healthcare wishes) before they meet with you. Our estate lawyer partners report:*

- *Reducing intake meetings from 2–3 hours to under 1 hour*
- *Clients arriving with organized information instead of scattered documents*
- *Better family conversations about wishes and values (because documents are accessible and visual)*

*This month, we're offering free white-label integration to 5 Canadian estate law firms. You'd provide your clients a branded "Client Document Center" as part of your intake process. No cost to you—we handle all the infrastructure.*

*Would it make sense to have a 20-minute conversation to see if this fits your practice? I can show you how three Toronto firms are using it.*

[Your Name]

Archevi Partnership Team

[partnership@archevi.ca](mailto:partnership@archevi.ca)

## Partner Segment 3: Insurance Agents (Life & Long-Term Care)

### Market Size & Opportunity

Canada has approximately **25,000 life and long-term care insurance agents and brokers**. The long-term care insurance market is experiencing growth as more Canadians recognize the gap between public healthcare coverage and actual care costs (home care ranging from \$13–90/hour, retirement homes \$800–8,000/month depending on province).<sup>[19]</sup> <sup>[20]</sup>

#### Market Dynamics:

- Long-term care insurance premiums range from \$50–90/month for 45-year-olds, \$100+ for age 55+, and \$200+/month for age 65+<sup>[21]</sup>
- Insurance agents earn 10–25% commission on premiums (standard in Canadian insurance industry)
- However, many potential clients are underserved due to poor documentation of health/financial status, leading to underwriting delays and lost sales

**Geographic Concentration:** Insurance brokers operate across Canada, with concentrations in Ontario, British Columbia, Alberta, and Quebec.<sup>[22]</sup>

### Primary Pain Points

Insurance agents face two interconnected challenges:

1. **Underwriting Documentation Delays:** Prospective clients often lack organized health records, financial documentation, and healthcare history. This extends underwriting timelines from 2–3 weeks to 6–8 weeks, delaying commissions and frustrating prospects.
2. **Client Qualification & Needs Discovery:** Agents struggle to quickly assess whether clients are good candidates for long-term care insurance. They rely on verbal conversations and incomplete questionnaires, missing important health or financial details that would affect eligibility or coverage amount.
3. **Client Education & Decision Confidence:** Long-term care insurance is complex. Many prospects don't understand the benefits, waiting periods, or how it complements other assets. Agents need better tools to educate and build confidence.

### Archevi's Value Proposition for Insurance Agents

**"Organize client health and financial records in days, not weeks. Archevi helps prospects prepare for long-term care insurance qualification while giving you documented health history and financial assets in one searchable system."**

Specific value drivers:

Value Dimension	Benefit	Financial Impact
<b>Faster Underwriting</b>	Organized health/financial records reduce underwriting timeline from 6–8 weeks to 2–3 weeks	Close sales 1 month faster; earn commissions sooner
<b>Higher Conversion</b>	Prospects see organized documents and understand coverage benefits better; fewer drop-outs	15–20% improvement in close rate (industry average ~60%)
<b>Documentation Compliance</b>	Automatic record of client health status, financial assets, care preferences	Reduces underwriting disputes; supports claims assessment
<b>Client Retention</b>	Families keep organized documents post-sale for ongoing care coordination	Future referrals and upsells (coverage reviews)
<b>Multi-Product Cross-Sell</b>	See complete financial picture (assets, liabilities, beneficiaries) during qualification	Opportunity to recommend complementary products (disability, critical illness)

## Ideal Partner Profile

**Target: Independent insurance brokers and agents (especially those focused on long-term care, critical illness, disability)**

Archevi resonates most strongly with:

- Agents with 50+ client households seeking to differentiate on service
- Brokers serving HNW or business owner segments
- Agents wanting faster underwriting and higher close rates
- Teams of 3–10 agents pooling resources for shared tools

**Geographic Priority:** Toronto, Vancouver, Calgary, Montreal.

## Revenue Model: Insurance Agents

### Tier 1 – Referral Partnership (Initial)

- **Structure:** Archevi pays flat fee per referred client or percentage of client subscription revenue
- **Mechanics:** Agent recommends Archevi to prospective insurance clients as part of needs assessment. Prospect uses Archevi to organize documents; agent references documents during underwriting. Archevi credits agent account.
- **Example:** Agent refers 20 prospects/year → 12 convert to Archevi Family plan (\$108/year) = \$200 flat fee per referred client who converts to LTC insurance = \$2,400 annual revenue to agent (12 × \$200)
- **Engagement Level:** Low (integration into client qualification process)
- **Timeline to Revenue:** 2–8 weeks after referral (aligned with underwriting timeline)

### Tier 2 – Co-Marketing Partnership (Growth)

- **Structure:** Revenue share + co-marketing support
- **Mechanics:**
  - Joint webinars on "Long-Term Care Planning for Families" or "Documenting Health Assets for Insurance" (1–2 per quarter)
  - Co-branded guide: "Long-Term Care Insurance Preparation Checklist"
  - Archevi featured in agent's client materials and website
  - Agent given white-label client intake portal
  - Success metrics tracking (referral volume, conversion rates, time-to-close)
- **Example:** Agent's referred clients generate \$1,500 ARR → Agent receives \$120–150 annually per referral cohort
- **Engagement Level:** Medium (5 hours/month for webinars, content, portal)
- **Timeline to Revenue:** 3–6 months to meaningful cohort

### **Tier 3 – White-Label or Platform Integration (Scale)**

- **Structure:** Agency-wide adoption or platform partnership
- **Mechanics:**
  - Archevi integrated into agency's client CRM or intake process
  - All prospective clients offered Archevi as part of agency's "Client Preparation Program"
  - Archevi provides white-label dashboard, API integration, compliance support
  - Revenue split: Agency keeps 30–35%, Archevi retains 65–70%
  - Minimum: 30 active clients annually
- **Example:** 5-agent brokerage with 200 client households; 20% adoption = 40 clients on Family plan (\$108/year). Agency revenue =  $40 \times \$108 \times 30\% = \$1,296$  annually; Archevi revenue =  $40 \times \$108 \times 70\% = \$3,024$ .
- **Engagement Level:** High (integration, training, ongoing support)
- **Timeline to Revenue:** 6–12 months to full deployment

## **Go-to-Market Approach: Insurance Agents**

### **1. Insurance Industry Association Engagement (Months 1–4)**

- **Target:** Life Insurance Council of Canada, provincial insurance broker associations, long-term care insurance specialist groups
- **Tactic:** Sponsor webinar or conference session on "Improving Long-Term Care Insurance Close Rates with Better Client Documentation"
- **Outcome:** Direct access to 500+ LTC insurance agents; credibility through industry partnerships

### **2. Insurance CRM & Practice Management Partnerships (Months 2–4)**

- **Approach:** Insurance-specific CRM platforms (Salesforce for Insurance, RedTail, Agency Platform)
- **Goal:** Archevi featured as recommended client intake/document management tool; affiliate partnership

### 3. LinkedIn & Direct Outreach (Months 2–3)

- **Search:** Insurance agents/brokers in target regions with content on long-term care planning, client documentation, or aging
- **Outreach:** Personalized pitch showing time-to-close improvement and underwriting efficiency gains

### 4. Content Marketing (Months 1–6)

- **Create:** Free downloadable guide: "Long-Term Care Insurance Preparation Checklist for Families"
- **Distribute:** Insurance blogs, LinkedIn, agent forums
- **Goal:** Warm leads before direct outreach; position Archevi as industry knowledge

### 5. Referral Partner Enablement (Month 3+)

- **Provide:**
  - 20-minute training video on integrating Archevi into client intake
  - Pre-written client invitation email
  - FAQ for agents on PIPEDA/compliance with Archevi
  - Monthly success metrics dashboard
  - Quarterly agent webinar with case studies

## Specific Outreach Template: Insurance Agents

**Subject: Reduce long-term care insurance underwriting time from 8 weeks to 3 weeks**

*[Agent Name],*

*I noticed you specialize in long-term care insurance for families in [region]. One of the biggest bottlenecks we hear from LTC agents is underwriting delays—waiting 6–8 weeks for clients to gather health records and financial documents.*

*Archevi is a Canadian platform that helps families organize their health, financial, and legal documents in one searchable system. Our insurance partners report:*

- *Reducing underwriting timeline by 50% (from 8 weeks to 3–4 weeks)*
- *15–20% improvement in close rates (fewer clients drop out during underwriting)*
- *Faster commission payments*

*This month, we're offering 10 insurance brokers a free trial. You refer prospects to use Archevi for document organization, and we track your underwriting timeline improvement.*

*Interested in seeing how this works? 20-minute call to show you the platform + testimonials from LTC agents in Ontario?*

*[Your Name]*

*Archevi Partnership Team*

*[partnership@archevi.ca](mailto:partnership@archevi.ca)*

## **Partner Segment 4: Senior Care Organizations**

### **Market Size & Opportunity**

Canada has **500+ home care and senior living providers** ranging from large publicly traded companies (Chartwell Retirement Residences, Extendicare) to boutique agencies (TheKey, specialized CCRCs). The senior care market is experiencing rapid growth due to aging demographics and preference for aging-in-place (home care vs. institutional care).<sup>[23]</sup> <sup>[24]</sup>

#### **Market Dynamics:**

- Home care services cost \$13–90/hour depending on service type and province<sup>[25]</sup>
- Assisted living/retirement homes range \$800–8,000+/month depending on province and level of care<sup>[26]</sup>
- Providers report that family coordination and intake documentation are significant operational pain points
- Care coordinators spend 3–5 hours per new client on intake, family communication, and document verification

**Geographic Concentration:** Largest providers operate across Canada, with major concentrations in Ontario, British Columbia, Alberta, and Quebec.

### **Primary Pain Points**

Senior care organizations face three interconnected challenges:

1. **Family Coordination & Communication Fragmentation:** When a senior transitions to home care or assisted living, critical health, legal, and financial information is scattered across family members, past healthcare providers, and personal files. Coordinators spend hours gathering information via phone calls and emails, creating delays and gaps in care.
2. **Inefficient Intake & Onboarding:** Current intake process is manual and paper-heavy. Staff manually enter client information into their system, creating duplication and errors. Families struggle to understand what documentation is needed, leading to back-and-forth email chains.
3. **Care Quality & Safety:** Missing critical documents (healthcare directives, medication lists, emergency contacts, insurance information) puts clients at risk and reduces care quality. Staff can't access complete health history or client preferences quickly.

4. **Family Satisfaction & Retention:** Families are frustrated by slow intake, repeated requests for information, and lack of visibility into their loved one's care. This drives negative reviews and client churn.

## Archevi's Value Proposition for Senior Care Organizations

**"Organize family information before intake. Archevi gives care coordinators complete visibility into client health, legal, and financial information—reducing intake time by 50%, improving care quality, and increasing family satisfaction."**

Specific value drivers:

Value Dimension	Benefit	Financial Impact
<b>Faster Intake</b>	Pre-populated family documents reduce intake from 3–5 hours to 1–2 hours	Save \$150–300 per client (staff time); serve more clients annually
<b>Better Care Quality</b>	Complete health history, directives, medication lists available at point of care	Reduce errors; improve compliance; better outcomes
<b>Family Engagement</b>	Families coordinate with each other and with care team via Archevi; reduced email/phone chaos	Improve satisfaction scores; reduce staff communication burden
<b>Risk Mitigation</b>	Documented healthcare wishes, emergency contacts, legal authority; audit trail of care coordination	Reduce liability; improve compliance with privacy regulations
<b>Staff Efficiency</b>	Care coordinators don't manually re-enter information; automatic document sharing with healthcare providers	Free staff time for higher-value care coordination
<b>Organizational Growth</b>	Faster onboarding allows team to scale without adding headcount	Improve unit economics; increase profitability per client

## Ideal Partner Profile

**Target: Mid to large senior care organizations (100+ active clients; multi-location providers)**

Archevi resonates most strongly with:

- Home care agencies expanding to assisted living/retirement home services
- Care coordination networks seeking differentiation on family engagement
- Providers targeting affluent seniors (willing to pay premium for tech-enabled care)
- Organizations modernizing operations and adopting digital intake

**Geographic Priority:** Toronto, Vancouver, Calgary, Ottawa, Montreal (larger providers in these regions).



## Revenue Model: Senior Care Organizations

### Tier 1 – Referral Partnership (Initial)

- **Structure:** Archevi pays flat fee per organization or per referred family
- **Mechanics:** Care organization recommends Archevi to families during intake. Families use Archevi to organize documents; organization benefits from faster intake. Archevi credits organization account.
- **Example:** Organization refers 50 families/year (5% of annual intake) → 30 adopt Archevi Family plan (\$108/year) = \$500–1,000 flat fee per organization annually (or \$100–200 per referred family)
- **Engagement Level:** Low (integration into intake process; staff training)
- **Timeline to Revenue:** 1–3 months after referral

### Tier 2 – Co-Marketing & Embedded Partnership (Growth)

- **Structure:** Revenue share + co-marketing
- **Mechanics:**
  - Archevi embedded as "Family Collaboration Hub" in organization's intake and care coordination processes
  - Joint webinars on "Aging in Place" or "Family-Centered Care Coordination" (2–3 per quarter)
  - Co-branded materials highlighting family engagement benefits
  - Archevi featured in organization's marketing and website
  - White-label care coordination dashboard (organization-branded)
  - Monthly reporting on family adoption, satisfaction scores, intake time savings
- **Example:** Organization with 200 active clients; 20% Archevi adoption = 40 families on Family plan (\$108/year). Organization receives 5–7% revenue share = \$216–302 annually; ongoing revenue from marketing leads
- **Engagement Level:** Medium (5–10 hours/month for webinars, content, staff training)
- **Timeline to Revenue:** 3–6 months to meaningful adoption

### Tier 3 – White-Label Platform Partnership (Scale)

- **Structure:** Full platform licensing + revenue share or licensing fee
- **Mechanics:**
  - Organization white-labels Archevi as proprietary "Family Portal" or "[Organization Name] Care Coordination System"
  - Archevi provides: white-label platform, API integration with care management systems (PointClickCare, GoldCare), staff training, PIPEDA compliance support, dedicated account manager
  - Revenue split: Organization keeps 35–40%, Archevi retains 60–65% (or flat licensing fee \$5,000–10,000/month depending on scale)

- Minimum: 100 active families annually; 1-year contract
- **Example:** Large care organization with 500 active clients; 30% Archevi adoption = 150 families on average plan. Annual family subscription revenue =  $150 \times \$108 = \$16,200$ . Organization revenue =  $\$16,200 \times 35\% = \$5,670$ ; Archevi revenue =  $\$16,200 \times 65\% = \$10,530$ . OR flat licensing fee of  $\$8,000/\text{month} = \$96,000$  annually (more predictable).
- **Engagement Level:** High (integration, staff training, ongoing support, marketing)
- **Timeline to Revenue:** 6–12 months to full deployment; longer sales cycle (requires board/executive approval)

## Go-to-Market Approach: Senior Care Organizations

### 1. Senior Care Industry Conference Presence (Months 1–4)

- **Target:** Canadian Care Conference (CCC), Seniors Care Industry Association (SCIA), provincial health/seniors forums
- **Tactic:** Booth presence, sponsor session on "Digital Family Engagement in Care Coordination," present case studies from early partner organizations
- **Outcome:** Direct access to 200–300 care leaders; credibility through industry engagement

### 2. Care Management Software Partnerships (Months 2–4)

- **Approach:** PointClickCare (major platform for long-term care), GoldCare, Mosaic, other Canadian care management systems
- **Goal:** Archevi featured as recommended family portal/intake solution; API integration and affiliate partnership

### 3. Direct Outreach to Identified Organizations (Months 2–3)

- **Search Strategy:** Identify mid-large care organizations in target provinces with public intake processes or care coordination challenges (from research, identified: CareSmartsX360, Salu Home Care, Welpart Partners, TheKey, etc.)
- **Outreach:** Pitch white-label or embedded partnership; emphasize intake efficiency and family satisfaction ROI

### 4. Content Marketing & Education (Months 1–6)

- **Create:** Free downloadable guide: "Family Document Checklist for Senior Care Transitions"
- **Distribute:** Senior care blogs, LinkedIn, industry forums
- **Goal:** Warm leads of care organizations and families; position Archevi as care industry knowledge partner

### 5. Referral Partner Enablement (Month 3+)

- **Provide:**
  - Training program for care coordinators (45-minute video + Q&A)
  - Staff communication templates and family invitation letters (branded)
  - PIPEDA/compliance documentation for care organizations

- Monthly success metrics dashboard (intake time, family adoption, satisfaction)
- Quarterly webinar with product updates and case studies

## **Specific Outreach Template: Senior Care Organizations**

**Subject: Reduce intake time by 50%. Improve family coordination.**

*[Care Director/CEO Name],*

*I noticed your organization has grown to [X clients] in [region] and is expanding home care services. One challenge care coordinators consistently mention is intake—families arrive with documents scattered across email and files, and coordinators spend 3–5 hours per client gathering information.*

*Archevi is a Canadian platform that helps families organize their health, legal, and financial documents before they arrive for intake. Our senior care partners report:*

- Reducing intake time by 50% (from 3–5 hours to 1–2 hours per client)*
- Improved family satisfaction (families have visibility into care coordination)*
- Better care quality (complete health history available at point of care)*

*We're partnering with 3–5 Canadian senior care organizations this quarter on a white-label basis. You'd offer families a branded "Care Coordination Hub" as part of your intake process, and we'd handle the infrastructure.*

*Would it make sense to have a conversation with your care coordinators to see if this solves a pain point? I can show you how other organizations are using it.*

*[Your Name]*

*Archevi Partnership Team*

*[partnership@archevi.ca](mailto:partnership@archevi.ca)*

## **Regional Strategy: Geographic Prioritization**

Archevi should prioritize partnerships in **three geographic clusters** in Year 1, then expand nationally in Years 2–3.

[1]

### **Priority 1: Greater Toronto Area (GTA) – Months 1–6**

**Why:** Largest concentration of financial advisors (~2,500), estate lawyers (~800), insurance agents (~3,500), and senior care providers in Canada. Highest professional network density.

#### **Targets:**

- Financial advisors: TD Wealth, Scotiabank Wealth Management, boutique RIAs
- Estate lawyers: Miller Thomson, Kimel Law, Bader Law, Fogler Rubinoff, AHBL

- Insurance agents: Independent brokers in Greater Toronto
- Senior care: TheKey (major operator), Baycrest, Perley Health, independent agencies

**Tactics:**

- Sponsor OBA Trusts & Estates Law Section event (October 2025)
- Attend Investment Executives (IE) conference (Spring 2026)
- Direct outreach to 50 advisors, 25 law firms, 20 insurance agents in first 90 days

**Priority 2: British Columbia (Vancouver & Victoria) – Months 3–9**

**Why:** Second-largest professional services market; strong wealth management presence; aging population driving senior care demand.

**Targets:**

- Financial advisors: Coastal wealth managers, RIAs
- Estate lawyers: Vancouver-based practitioners
- Insurance agents: BC broker networks
- Senior care: Senior care providers in Vancouver and outlying regions

**Tactics:**

- Law Society of BC outreach; sponsor CLE program
- Direct outreach to 30 advisors, 15 law firms, 15 insurance agents
- Attend senior care conferences in BC

**Priority 3: Quebec (Montreal) – Months 3–9**

**Why:** Third-largest professional market; unique estate law requirements (Civil Code); strong Francophone professional networks.

**Note:** Archevi should develop French-language materials and consider French-language interface by Month 6 to succeed in Quebec.

**Targets:**

- Financial advisors: Montreal-based RIAs and boutiques
- Estate lawyers: Montreal estate law firms (uniquely trained in Quebec law)
- Insurance agents: Quebec-based brokers
- Senior care: Montreal-area organizations

**Tactics:**

- Quebec Bar Association outreach
- French-language webinar series (Month 6+)
- Direct outreach to 30 advisors, 15 law firms, 15 insurance agents

## Geographic Expansion (Years 2–3)

- Year 2: Expand to Alberta (Calgary), Manitoba (Winnipeg), and Nova Scotia
- Year 3: National coverage with localized partnerships in every province

## Partnership Compliance & Legal Considerations

All partnerships must address Canadian privacy, professional ethics, and regulatory requirements:

### PIPEDA Compliance

Archevi is **PIPEDA compliant** as a SaaS platform. Partners must ensure:

- All referrals include explicit consent from families for Archevi's data processing
- Privacy policies clearly state that Archevi does not use family documents for AI training
- Partners agree to include Archevi in their privacy notices to clients

**Action:** Develop "Partner Privacy Addendum" template for all partnership agreements clarifying data responsibilities.

### Professional Ethics & Regulatory Requirements

**Estate Lawyers:** Ensure partnerships don't violate Law Society rules on client confidentiality, unauthorized practice, or conflicts of interest. Recommend legal review of partnership agreements.

**Financial Advisors:** Ensure Archevi is presented as client service enhancement, not as financial advice or product. Disclosure of any compensation arrangements.

**Insurance Agents:** FSCO (Financial Services Regulatory Authority) and provincial insurance regulators may require disclosure of partnerships and compensation. Recommend insurance broker consult with compliance counsel.

**Senior Care Organizations:** Care quality regulations and privacy laws (PIPEDA, provincial health privacy laws) require documentation of information security measures. Provide detailed SOC 2 compliance reports.

### Professional Liability & Indemnification

Partnership agreements should include:

- Clear limitation of liability (Archevi liability capped at annual subscription fees paid)
- Indemnification for partner misuse of platform
- Data breach notification procedures
- Termination provisions (30–60 day notice)

**Recommendation:** Engage Canadian technology law firm (e.g., Cassels, Blake Henderson, Miller Thomson Tech practice) to draft standard partnership agreement by Month 2.

**Implementation Roadmap: Year 1**

**Phase 1: Foundation & Enablement (Months 1–3)**

Milestone	Owner	Deliverable
Partner legal framework	Legal + Operations	Standard partnership agreement, referral terms, revenue share templates
Sales enablement content	Marketing	Partner one-pagers, case studies, demo videos for each segment
Referral tracking system	Product + Ops	Implement referral tracking in Archevi dashboard; commission calculation automation
Geographic targeting list	Sales	Identify 50 advisors, 25 law firms, 20 insurance agents, 10 senior care orgs per priority region
Outreach sequences	Sales	Personalized email/LinkedIn sequences for each segment

**Goal:** All systems ready to execute outreach; first 10 referral partners onboarded with clear success metrics.

**Phase 2: Initial Outreach & Relationship Building (Months 2–6)**

Milestone	Owner	Timing	Target
Industry conference presence	Marketing + BD	Oct 2025, Jan 2026, Mar 2026	500+ professional contacts
Direct outreach campaign	Sales	Ongoing, 5–10 per week	50 advisors, 25 lawyers, 20 agents, 10 care orgs contacted
First co-marketing webinars	Marketing + Partners	Months 3–4	2–3 webinars hosted; 200+ attendees
Early partner success stories	Marketing	Month 4–5	3–5 case studies published

**Goal:** 20–30 referral partners signed; 3–5 co-marketing partners engaged; clear market feedback on value propositions.

**Phase 3: Scale & Iteration (Months 6–12)**

Milestone	Owner	Timing	Target
First white-label implementation	Product + Sales	Month 6–9	1 law firm, 1 financial advisory firm
Expanded co-marketing	Marketing + Partners	Months 6–12	8–10 co-marketing partnerships active

Milestone	Owner	Timing	Target
Partner enablement portal	Product + Operations	Month 6	Self-serve onboarding, training, metrics dashboard
French-language materials	Marketing + Product	Month 6	French website, webinar, partnership materials for Quebec
Quarterly partner webinars	Marketing + BD	Months 6, 9, 12	Educational content, product updates, partner wins
Revenue tracking & reporting	Operations + Finance	Ongoing	Monthly partner reporting; commission payouts

**Goal:** 50–100 active referral partners; 10–15 co-marketing partnerships; 2–3 white-label implementations; CAD 300,000–500,000 partnership ARR.

## Revenue Projections & Financial Model

### Year 1 Partnership Revenue Forecast

#### Conservative Scenario (50 referral partners)

Partner Tier	Count	Avg Annual Revenue per Partner	Total ARR	Archevi Share (60–70% for referral)	Notes
<b>Referral</b>	50	CAD 500	CAD 25,000	CAD 15,000 (60%)	10–15 referrals per partner annually; 40% conversion
<b>Co-Marketing</b>	8	CAD 2,500	CAD 20,000	CAD 12,000 (60%)	Revenue share model; shared client acquisition
<b>White-Label</b>	1	CAD 8,000	CAD 8,000	CAD 5,200 (65%)	1 law firm or advisory firm pilot; 25–30 client adoption
<b>Total Year 1</b>	—	—	<b>CAD 53,000</b>	<b>CAD 32,200</b>	—

#### Growth Scenario (100 referral partners)

Partner Tier	Count	Avg Annual Revenue per Partner	Total ARR	Archevi Share (60–70%)	Notes
<b>Referral</b>	100	CAD 750	CAD 75,000	CAD 45,000 (60%)	15–20 referrals per partner; 45% conversion
<b>Co-Marketing</b>	15	CAD 3,500	CAD 52,500	CAD 31,500 (60%)	15 active partnerships; higher conversion
<b>White-Label</b>	3	CAD 12,000	CAD 36,000	CAD 23,400 (65%)	3 implementations across segments

Partner Tier	Count	Avg Annual Revenue per Partner	Total ARR	Archevi Share (60–70%)	Notes
Total Year 1	—	—	<b>CAD 163,500</b>	<b>CAD 99,900</b>	—

### Year 2–3 Projections

#### Year 2:

- Referral partners: 200 (150% growth)
- Co-marketing: 30 (2x growth)
- White-label: 8–10 (3–4x growth)
- **Projected Partnership ARR:** CAD 400,000–600,000

#### Year 3:

- Referral partners: 300 (network effect; organic referrals)
- Co-marketing: 50 (market saturation in priority regions)
- White-label: 20–25 (enterprise segment scaling)
- **Projected Partnership ARR:** CAD 1.2M–1.8M

### Key Success Metrics & Tracking

#### Partner-Level Metrics

Metric	Target (Year 1)	Tracking Method
<b>Referral partners onboarded</b>	50–100	Referral dashboard; partner portal
<b>Referrals per partner per month</b>	5–10	Referral tracking API
<b>Conversion rate (referred lead → paid customer)</b>	35–45%	Archevi analytics; referral source tracking
<b>Average customer LTV from referrals</b>	CAD 300–500	Revenue tracking; churn analysis
<b>Partner satisfaction (NPS)</b>	50+	Quarterly survey
<b>Co-marketing lead volume</b>	100+ per partnership	UTM tracking; webinar registrations
<b>White-label adoption rate</b>	25–30% of partner's client base	Partner reporting



## Business Metrics

Metric	Target (Year 1)	Tracking Method
Partnership-sourced customer acquisition cost (CAC)	CAD 50–100 (vs. CAD 200+ for paid ads)	Finance; referral tracking
Partnership-sourced customer lifetime value (LTV)	CAD 400–600	Finance; cohort analysis
LTV:CAC ratio	4:1 to 6:1	Finance
Partnership ARR	CAD 50,000–100,000+	Finance; partner reporting
Partnership ARR as % of total ARR	15–25 %	Finance

## Risk Mitigation & Contingency Planning

### Key Risks & Mitigation

Risk	Impact	Mitigation
Low partner adoption	Revenue below projections; slow market traction	1) Start with referral tier (low friction); 2) Offer higher commissions initially; 3) Provide robust enablement; 4) Measure and iterate quickly
Regulatory/compliance issues	Partners pause or terminate; reputational risk	1) Engage Canadian tech law firm early; 2) Provide compliance templates; 3) Regular compliance updates; 4) PIPEDA audit annually
Product-market fit issues	Partners and referrals don't convert	1) Gather feedback from first 10 partners monthly; 2) Adjust value prop based on feedback; 3) Iterate product roadmap accordingly; 4) Consider pivot or repositioning
Partner churn	Recurring revenue becomes volatile	1) Track partner satisfaction quarterly (NPS); 2) Proactive support and check-ins; 3) Clear success metrics and reporting; 4) Quarterly partner webinars and engagement
Geographic concentration risk	Heavy GTA/BC reliance; Quebec expansion slower than planned	1) Hire French-language BD person by Month 5; 2) Establish Quebec partnerships earlier; 3) Develop multilingual materials by Month 6
White-label complexity	Integration delays; scope creep; resource constraints	1) Define clear white-label scope upfront; 2) Limit to 1–2 pilots in Year 1; 3) Hire dedicated white-label success person by Month 6; 4) Establish SLA and support boundaries

## Conclusion & Next Steps

Archevi has a **clear, segmented opportunity** to capture market share across four high-value professional service provider segments in Canada. The combined addressable market exceeds 60,000 professionals serving millions of Canadian families facing critical document organization and care coordination challenges.

### Recommended Next Steps (Weeks 1–4):

1. **Engage legal counsel** (Tech law firm): Draft standard partnership agreement and referral terms
2. **Build referral infrastructure**: Implement referral tracking and commission automation in Archevi dashboard
3. **Develop sales enablement**: Create one-pagers, case studies, demo videos for each segment
4. **Identify initial targets**: Build prioritized list of 50 advisors, 25 law firms, 20 insurance agents, 10 care organizations in GTA
5. **Establish outreach cadence**: Launch first email/LinkedIn outreach sequences by Week 4
6. **Plan conference presence**: Book booth or sponsorship at 2–3 industry conferences (Oct 2025–Jan 2026)
7. **Assign partnership owner**: Hire or designate Director of Partnerships to lead execution

### Success Measures (6-Month Check-in):

- 20–30 referral partners signed and active
- 3–5 co-marketing partnerships engaged
- CAD 20,000–30,000 partnership ARR
- 500+ professional contacts from conference presence
- Clear product feedback from early partners; iterations made

The partnership strategy is **scalable, low-risk, and aligned with Archevi's SaaS business model**. Early execution in Q4 2025 will establish Archevi as the trusted document and care coordination platform for Canadian professional service providers by end of Year 1.

## Appendix: Partner-Specific Resources

### Financial Advisors<sup>[1]</sup>

- Initial Outreach Template (above)
- Co-Marketing Case Study: "[Advisor Name] Increased Client Retention by 12% Using Archevi"
- White-Label One-Pager: "Resell Archevi as Your Client Information Hub"

### Estate Lawyers<sup>[2]</sup>

- Initial Outreach Template (above)

- Co-Marketing Case Study: "[Law Firm Name] Reduced Client Intake Time by 40%"
- Partner Privacy Addendum: Ensuring PIPEDA Compliance in Estate Law Partnerships

### **Insurance Agents<sup>[3]</sup>**

- Initial Outreach Template (above)
- Co-Marketing Case Study: "[Insurance Broker Name] Improved LTC Insurance Close Rate by 18%"
- Underwriting Timeline Measurement Guide: Tracking Time Savings

### **Senior Care Organizations<sup>[4]</sup>**

- Initial Outreach Template (above)
- Co-Marketing Case Study: "[Care Organization Name] Improved Family Satisfaction by 25%"
- Care Coordinator Training Program (45-minute video)
- PIPEDA Compliance & Care Quality Assurance Guide

Canada Estate Planning Service Market, LinkedIn Pulse, July 2025<sup>[1]</sup>

Senior population demographics, Insurance Business Magazine, March 2023<sup>[2]</sup>

Canada aging population projection, Accomsure, 2021<sup>[3]</sup>

Canada Estate Planning Service Market projection, LinkedIn Pulse, July 2025<sup>[4]</sup>

Estate planning participation rate, Canadian Lawyer Magazine, 2024<sup>[5]</sup>

Estate lawyer practices report, Canadian Lawyer Magazine, 2024<sup>[6]</sup>

Wealth management AI adoption, Celent WealthTech Trends, 2025<sup>[7]</sup>

Senior care coordination challenges, Healthcare Excellence Canada, 2023<sup>[8]</sup>

Canadian financial advisor count and assets, IG Wealth Management/Investment Executive, 2025<sup>[9]</sup>

Financial advisor assets under management, Investment Executive Report Card, 2025<sup>[10]</sup>

Financial advisor technology partnerships, Alden Investment Group & Celent, 2025<sup>[11]</sup>

Insurance industry demographics, Conference Board of Canada/Insurance Institute, 2022–2023<sup>[12]</sup>

Wealth management partnerships and TAMPs, Celent, 2025<sup>[13]</sup>

WealthTech trends in 2025, Celent, 2025<sup>[14]</sup>

Canadian will completion rates and estate planning growth, Canadian Lawyer Magazine & LinkedIn Pulse, 2024–2025<sup>[15]</sup>

Estate lawyer practice report and communication challenges, Canadian Lawyer Magazine, 2024<sup>[16]</sup>

Estate lawyer client acquisition strategies, Canadian Lawyer Magazine, 2024<sup>[17]</sup>

Lawyer use of visualization tools, eState Planner report cited in Canadian Lawyer Magazine, 2024<sup>[18]</sup>

Canadian insurance agent count, Insurance Institute demographics, 2023<sup>[19]</sup>

Long-term care costs in Canada, Insurance Business Magazine, 2023<sup>[20]</sup>

Long-term care insurance premiums, Financial Consumer Agency of Canada, 2023<sup>[21]</sup>

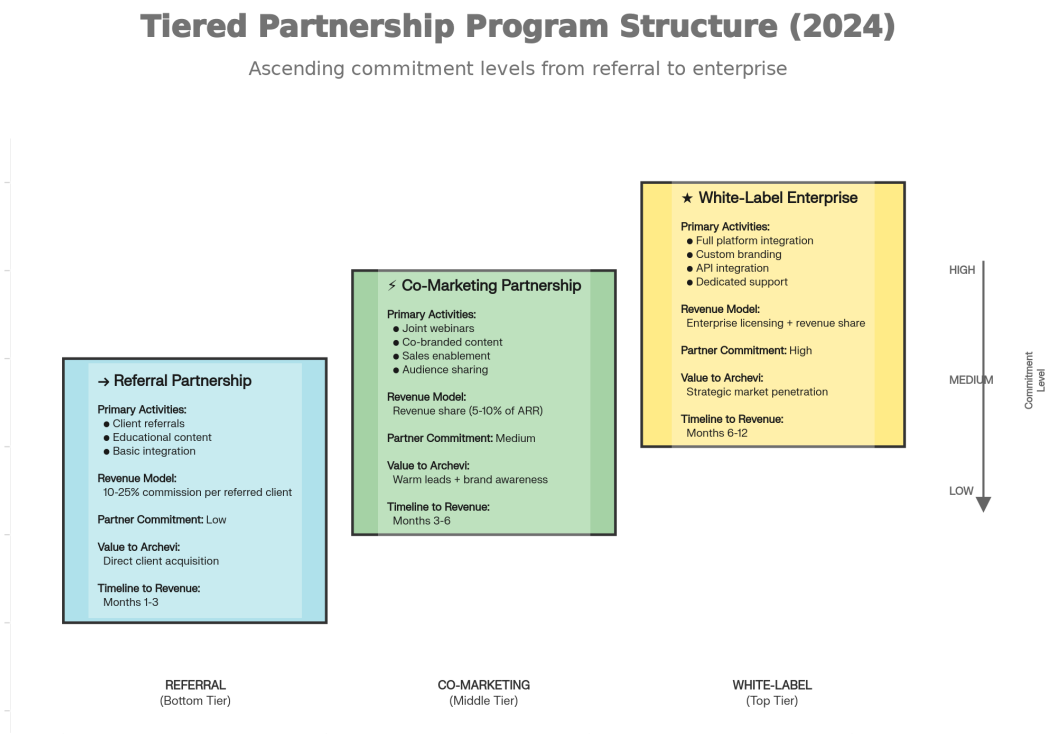
Insurance broker geographic distribution, Conference Board of Canada, 2022<sup>[22]</sup>

Canadian senior care provider landscape, Healthcare Excellence Canada & care industry associations, 2023–2025<sup>[23]</sup>

Senior care operational challenges, CareSmartsX360 blog & PointClickCare resources, 2024–2025<sup>[24]</sup>

Home care and assisted living costs by province, Insurance Business Magazine, 2023<sup>[25]</sup>

Retirement home costs by province, Insurance Business Magazine, 2023<sup>[26]</sup>



Archevi Three-Tier Partnership Program Structure

# Partner Segment Comparison for Canadian Market

Four key partner types with distinct value propositions

Criteria	Financial Advisors	Estate Lawyers	Insurance Agents	Senior Care Organizations
Market Size	~30,000 advisors in Canada	~8,000 estate law practitioners	~25,000 life/long-term care agents	~500+ home care/assisted living providers
Client Pain Point	Clients lack organized financial/estate documents; time wasted gathering client info	Clients arrive unprepared; document collection takes weeks; poor client understanding	Gaps in client record-keeping; compliance/documentation challenges	Family coordination fragmented; missing critical health/legal info for new clients
Archevi's Value Prop	Help clients organize estate/financial docs, improve planning conversations	Pre-organize client docs, faster intake, improved communication with visual tools	Help clients document health/financial info for LTC insurance qualification	Secure family collaboration, organized intake documentation, care coordination
Partner Motivation	Enhanced service delivery, client retention, competitive advantage	Efficiency gains, higher-value client relationships, practice growth	Improved client outcomes, reduced underwriting delays, policy sales support	Reduced onboarding time, improved care quality, family satisfaction
Go-to-Market	Industry conferences, advisor associations, CRM/TAMP partnerships	Law society events, practice management conferences, CLE/CPD programs	Insurance associations, broker networks, long-term care conferences	Care industry conferences, senior living associations, direct outreach
Revenue Potential	\$500-2000 CAD/year per advisor	\$1000-3000 CAD/year per firm	\$300-1000 CAD/year per agent	\$3000-10000 CAD/year per organization

## Archevi Partner Segment Analysis: Market Opportunity and Go-to-Market Strategy

✱

1. [Canadian-Professional-Partners-Elder-Care-and-Estate-Planning.md](#)
2. Archevi\_Product\_Brief.md
3. <https://www.researchandmarkets.com/reports/5807073/financial-advisory-market-report>
4. <https://www.linkedin.com/pulse/canada-estate-planning-service-market-drivers-challenges-lssmc>
5. <https://www.accomsure.com/resources/senior-policyholders-home-insurance-industry/>
6. <https://www.newswire.ca/news-releases/ig-wealth-management-canadian-advisor-perception-industry-study-finds-gaps-exist-between-advisors-needs-and-dealer-support-814622557.html>
7. <https://www.canadianlawyermag.com/practice-areas/trusts-and-estates/the-2024-estate-practice-report-rising-fees-new-client-acquisition-trends-and-more/388391>
8. <https://swgins.com/navigating-senior-care-commercial-insurance-in-canada/>
9. [https://www.investmentexecutive.com/newspaper/\\_advisors-were-ready-for-2025-market-volatility/](https://www.investmentexecutive.com/newspaper/_advisors-were-ready-for-2025-market-volatility/)
10. <https://www.canadianlawyermag.com/practice-areas/trusts-and-estates/exclusive-insights-into-how-estate-lawyers-run-their-practice-in-2023/380055>
11. <https://www.insuranceinstitute.ca/-/media/InsuranceInstitute/Research-Reports/PDF/2023-Demographic-Research-Report-EN.pdf>
12. <https://www.statista.com/outlook/fmo/wealth-management/financial-advisory/canada>
13. <https://www.tremendous.com/blog/referral-partner-program/>
14. <https://www.introw.io/blog/b2b-saas-partnerships>
15. <https://geotargetly.com/blog/pipeda-compliance-guide-to-canada-privacy-law>

16. <https://www.salesforce.com/sales/partner-relationship-management/referral-partner/>
17. <https://cassels.com/expertise/high-growth-venture-capital/>
18. <https://jane.app/guide/is-jane-pipeda-compliant>
19. <https://www.prefinery.com/blog/roi-analysis-for-referral-partnerships/>
20. <https://jasonpereira.ca>
21. <https://www.onetrust.com/blog/the-ultimate-guide-to-pipeda-compliance/>
22. <https://referralrock.com/blog/referral-partnerships/>
23. <https://www.insurancebusinessmag.com/ca/guides/long-term-care-insurance-in-canada-benefits-and-drawbacks-438711.aspx>
24. <https://www.sprintseniorcare.org/about-us/collaborative-partnerships/>
25. <https://www.sellerscommerce.com/blog/how-to-price-white-label-software/>
26. <https://www.canadianlic.com/blog/understanding-the-long-term-care-insurance-market-in-canada/>
27. <https://thekey.ca>
28. <https://www.cloudcampaign.com/blog/how-to-price-white-label-software>
29. [https://www.clhia.ca/web/CLHIA\\_LP4W\\_LND\\_Webstation.nsf/resources/Consumer+Brochures/\\$file/Brochure\\_Guide\\_Long\\_Term\\_Care\\_ENG.pdf](https://www.clhia.ca/web/CLHIA_LP4W_LND_Webstation.nsf/resources/Consumer+Brochures/$file/Brochure_Guide_Long_Term_Care_ENG.pdf)
30. <https://www.healthcareexcellence.ca/en/what-we-do/care-of-older-adults-with-health-and-social-needs/>
31. <https://bettersuite.io/blog/white-label-solution-pricing-guide>
32. <https://www.edwardjones.ca/ca-en/investment-services/insurance/long-term-care-insurance>
33. <https://www.saastr.com/what-are-typical-commission-ranges-for-referral-partners-for-enterprise-b2b-saas/>
34. <https://www.achenhenderson.ca/podcast/business-structures-for-law-firms/>
35. <https://www.celent.com/en/insights/wealth-tech-trends-in-2025-ai-partnerships-and-strategic-fintech-moves>
36. <https://www.bridgement.com/blog/case-studies/commission-rates-for-referral-partners/>
37. <https://metacomet.com/solutions/revenue-sharing-software/>
38. <https://aldeninvestmentgroup.com/blog/2025-financial-advisor-technology-guide/>
39. <https://lightpathfiber.com/articles/ultimate-guide-referral-partner-programs>
40. [https://dyedurham.ca/solution/unity\\_accounting/](https://dyedurham.ca/solution/unity_accounting/)
41. <https://fusioniq.io/thought-leadership/digital-strategies-for-wealth-management-success-in-2025/>
42. <https://agencyanalytics.com/blog/agency-referral-fee>