

GROW YOUR BUSINESS.  
SCALE YOUR PRACTICE.  
ADD MORE VALUE.

## WHY WEALTHCARE

Wealthcare is the originator of the Goals-Based Wealth Management (GBWM) movement. We continue to pioneer the evolution of goals-centric guidance and financial advising.

In 1999, we invented the world's first GBWM software. Subsequently, we created and patented our unique GBWM process that helps you confidently know where your clients stand at any point during their financial lives. We're proud of our leading role, yet who we are goes far beyond our patented process, cutting-edge technology or sophisticated infrastructure.

## WHAT YOU CAN EXPECT FROM WEALTHCARE

### ✓ MORE THAN SOFTWARE

Wealthcare puts you, the advisor, in the middle of the value proposition. It provides you with an ecosystem that helps you make the most of our GBWM process: Our cutting-edge planning software, ongoing advice for your clients and our platform.



### ✓ DEEPER CLIENT RELATIONSHIPS

We will give you the tools to gain much greater insight into what your clients truly value. Each step in the Wealthcare system is designed to strengthen the advisor-client relationship and create greater trust — through the powerful marriage of meaningful conversation and cutting-edge technology.

### ✓ INCREASED CLIENT ASSETS

To create a financial plan that is accurate and relevant, you need a clear understanding of clients' entire financial picture — including assets

they may hold elsewhere. Because our process shows clients the benefits of synchronizing their total wealth, you're more likely to support all of their assets from the start.

### ✓ HIGHER RETENTION & REFERRAL RATES

By freeing your clients from performance-based worries and building a comprehensive plan for the lives they desire, you become irreplaceable. Many clients are so amazed by how the Wealthcare process shows their likelihood of achieving goals they want to share this new confidence with friends and family.