Wealthcare Capital Management Introduces Financeware 2.0

Richmond, VA and Philadelphia, PA (November 19, 2015) Wealthcare Capital Management (www.wealthcarecapital.com), a nationally recognized wealth management firm, today introduced Financeware 2.0 (FW), the next generation of the industry's leading goals-based investing and wealth management software for enterprises, advisors and their clients. Launched in 1999, Financeware is currently used by more than 30,000 financial professionals with over $1 trillion of assets connected to nearly a million plans.

Highly customizable and infinitely scalable, Financeware 2.0 answers an overwhelming market demand for an easy-to-use, powerful tool that helps advisors manage clients' expectations and behaviors while providing personalized counsel that integrates with investment strategies.

The Money Management Institute (MMI) reported that only 1 out of 5 U.S. investors, and 12% globally, believe they are wholly prepared to reach their goals. In a recent paper titled, *The Performance Paradox,* the MMI states that when investors focus solely on the returns element of performance, they not only achieve sub-optimal outcomes, but also hinder their ability to achieve long-term goals.

"The investment industry is experiencing a paradigm shift driven by multiple macro forces causing investors to seek out more holistic investment guidance," said Michael Ashker, Wealthcare Capital Management CEO. "Financeware 2.0 offers a dynamic, life-long process that aligns advisor and investor interests.

"Real performance should be measured by helping clients achieve their life goals – not just tracking an index."

With Financeware 2.0, clients and their advisors will have access to myriad new modules, such as the highly visual and interactive life-goals selector called the Dreamboard, the "What If" Command Center, as well as the newly designed Comfort Zone® indicator. Wealthcare's proprietary Monte Carlo simulation engine, which powers FW, is capable of running 100,000 life time simulations in seconds, whereby various investment models are connected to each client's specific goals, market volatility, risk tolerance, with metrics resulting in a dynamic ComfortZone® score.

FW eliminates the complexity common to other planning software applications. A redesigned user interface, which features the interactive Dreamboard, is intuitive and visually engaging. Streamlined navigation enables advisors to present clients with a detailed, yet easy-to-understand roadmap that provides not just a snapshot of short-term performance, but also the alignment of current investments to long-term financial objectives.

An expansive API library allows enterprise customers to enjoy true customization and the deepest levels of integration, and by extension, the ability to create their own brand-centric approaches to goals-based wealth management.

ComfortZone® "Where's My Dot?" monitoring manages future confidence to achieve life goals while avoiding excessive risk and lifestyle sacrifice. This approach transforms advisor-client conversations to focus more on life goals than market performance.

Financeware 2.0 empowers advisors to not only deliver an exceptional customer experience, but also the means to handle more clients with greater efficiency. In addition to strengthening client relationships, FW helps uncover and consolidate hidden assets, as well as cross-sell new investment services such as insurance (life, long-term, disability, health, and analysis), tax, estate planning, social security optimization, and other products conducive to a family's financial success.

Features & Functionality

- Next-generation digital and mobile user interface that's intuitive and interactive.
- Multi-device anywhere, anytime design for desktops, tablets and smartphones.
- Integrated data and content for segmented use cases and predictive analytics.
- Multi-channel segmented tools, websites, advisor dashboards and client portals.
- Integrated active and passive MF and ETF strategies offering investment choice.
- Integration into back office systems, investment models, CRM, CMS, Data Analytics, Life Yield, and other third-party systems.
- Security and Reliability: Enterprise standards.
- Multi-channel and Client Segmentation: A single platform that adapts according to the user and client type.

Wealthcare Capital provides goals-based advice on over $1 trillion in assets under administration through its enterprise model and another $1.5 billion in assets under management through its exclusive independent advisor network. Creator of the original goals-based investment methodology invented more than 15 years ago and for which the firm holds 12 patents, Wealthcare Capital provides a full suite of practice-management solutions and support services.

ABOUT WEALTHCARE CAPITAL MANAGEMENT

Founded in 1999, Wealthcare Capital Management is the creator of the original goals-based investment methodology invented more than 15 years ago and holds 12 patents on this proven financial planning process. Driven by the belief that both advisors and investors deserve a better way to achieve their life dreams, we provide a full-suite of practice-management support services that empower advisors to achieve a fulfilling career, while giving investors an objective, personalized client experience. We back the entire process by our industry-leading software, Financeware, which more than 30,000 advisors use nationwide.

For additional information, please visit www.wealthcarecapital.com. Follow us on Twitter @WealthcareWay.

ABOUT NEWSPRING HOLDINGS

NewSpring Holdings, LLC, based in Radnor, Penn., focuses on control buyouts and platform builds, targeting profitable, growing companies seeking a financial partner to better assist them in achieving their goals. NewSpring Holdings is part of NewSpring Capital, which collectively manages more than $1 billion of committed capital supporting more than 100 portfolio companies across its growth equity, control buyout and mezzanine debt strategies. NewSpring Capital combines deep operating knowledge with financial and investing expertise to provide growing companies the financial resources, advice, network of contacts and strategic partnerships necessary to be successful.

To learn more about NewSpring Capital, please visit http://www.newspringcapital.com.