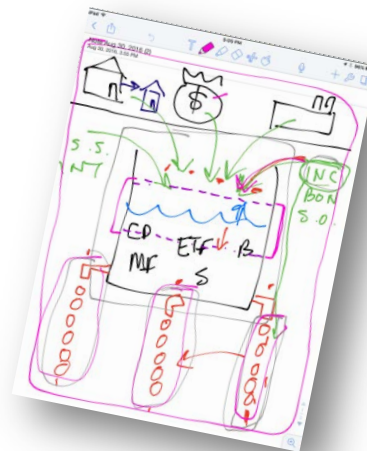
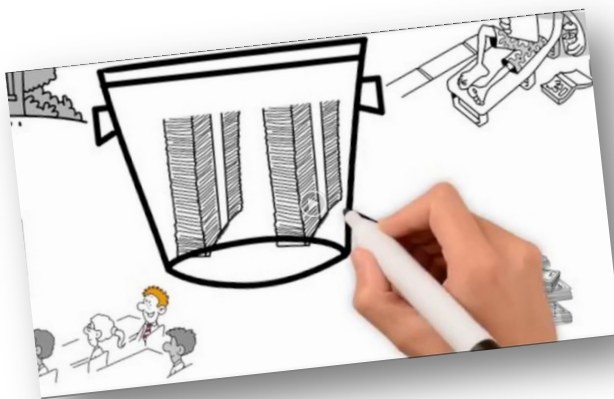


THE BUCKET CONVERSATION

GDX360 is a goals driven financial guidance system that aligns your client's money with what matters to them most, empowering them to make better decisions to help them attain their life goals. This process is a holistic and ongoing view of a client's **entire financial life**. When explaining Wealthcare's approach to financial advising, advisors often use an illustration.



Here are a few ways you can use the illustrated conversation we call **"Your Financial Bucket"**. You can.....

- 1) Learn how to deliver it in person, on an iPad, or White Board by watching advisor [Russ Thornton](#).

Here is some [complied scripting](#) to help you:

- 2) Add it to your website or share it on social media:

Example Content:

Are you interested in a different approach to financial advising and decision making? My approach to advice about your finances and your life is quite different when compared to that of the typical advisor. [Please watch this video](#) to see what I do for my clients. After you've taken a look, give me a call and let's talk about it.

3) Send it to prospects in an email:

Dear Client,

Perhaps you remember the 1999 sci-fi movie The Matrix.

In the movie, Laurence Fishburne's character, Morpheus, tells Thomas Anderson/Neo – played by Keanu Reeves – that “no one can tell you what the matrix is; you have to see it for yourself.”

Well, much the same could be said about how I deliver financial advice to people just like you. Every time I attempt to describe what I do, it likely comes across sounding just like every other financial advisor out there. But that's a communication issue; because I believe that my approach to advice about your finances and your life are quite distinctive when compared to the typical advisor.

Rather than trying to explain what I do for my clients – and why, I invite you to watch this short video. Consider it an opportunity to begin to “see it for yourself”

[“The Bucket Conversation”](#)

After you've watched the video, give me a call and let's talk about it. Please feel welcome to forward this email to your family, friends, and coworkers who might be interested in a different approach to financial advice and decision making.

Cheers,
Advisor Name



All the above copy has been complied. If you are planning on using or sharing the video or copy in a manner other than what has been suggested, send your request with a description of where it will be used, to whom you will be sending it and the language you will be using to: compliance@wealthcarecapital.com for approval.