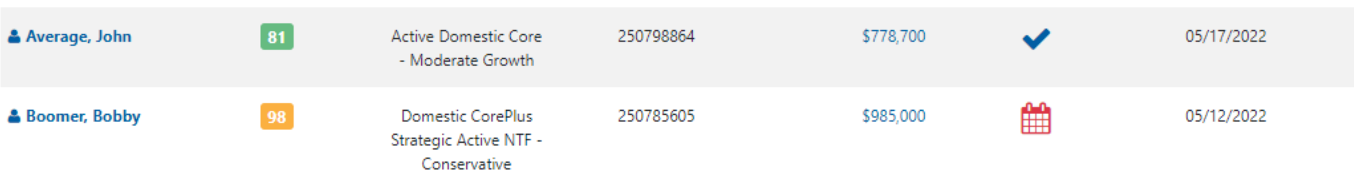
CMA Swapping - 2023

Please Note: Any plans that were still on the 2021 assumptions were automatically moved to the 2022 assumptions. All plan results on the 2022 assumptions will remain the same until you take special Capital Market Assumption (CMA) swapping action. **New profiles or plans** created on new clients **will not** have the **swap back and forth** functionality and will automatically use the newest CMA's. Any plans not swapped forward during the next year will be automatically converted in 2024 when we retire the 2022 CMA's.

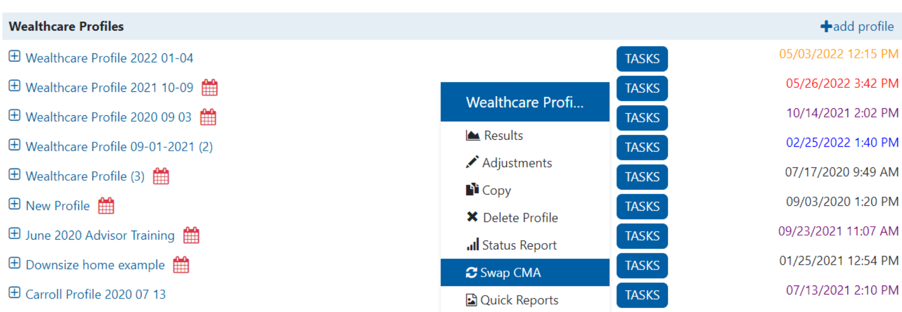
Advisor Dashboard:

- A **2022 CMA icon** allows you to easily identify households with a Recommended Working Plan/Wealthcare Profile of Record still on the 2022 CMA's.



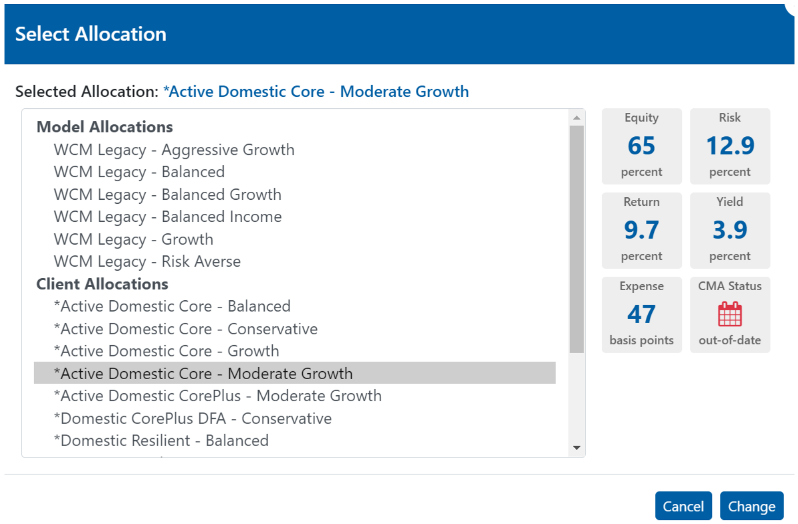
Plan List:

- A **Swap CMA** function appears in the task menu to the right of the client's profile or plan on the plan list page. This **Swap CMA** function lets users swap **existing** plans or profiles forward and backward.
- **Existing** plans on **old** assumptions are easily identified by the **2022 CMA icon**
- **Helpful Hint:** Make a copy of your Profile/Plan/POR (and save a complete report) before you initiate the **CMA SWAP** to retain the original.



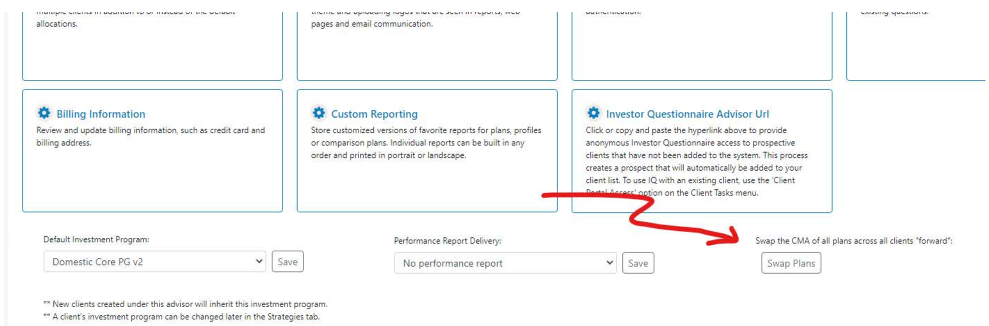
Adjustments Page:

- The **Allocation** icon on the adjustments page with notify advisors if the CMA for plan or profile is out-of-date



Global Swap

- You can swap all plans and profiles on your entire book of business at once by hovering over your name in the upper right-hand corner of GDX360 > click on the preferences > swap plans.



For more information on Wealthcare's 2023 Capital Market Assumptions, please visit the **CMA Landing Page** available in the Investment section of the Resources tab or contact support@wealthcarecapital.com.