

# GDX360 | Resilient Strategy

In an era of historically low yields, muted projected returns, and a challenging economic landscape, adhering only to a traditional 60/40 mix of domestic stocks and bonds may not provide the level of returns investors need to reach to their goals. In reaction to this dilemma Wealthcare created the Resilient Strategy.

## Resilient Strategy Thesis:

Wealthcare's Resilient Strategy is designed to manage risk and exploit opportunities presented by ultra-low interest rates, valuation discrepancies, and rapidly changing technology.

## Key Portfolio Positioning:

### Lower Bond Allocation

The portfolio prudently lowers capital allocated to bonds, because lower treasury yields should translate to lower bond returns.

### Add Yield

Treasuries have morphed from risk free to return free assets. Within the core fixed income sleeve, we strategically search for incremental yield in a risk conscious manner by significantly underweighting treasuries.

### Exploit Long Term Trends

Through a passive basket of cybersecurity, genomics, immunology, global clean energy, robotics, and artificial intelligence companies the strategy captures the returns associated with these S&P 500 leaders of the future.

### Capture Undervalued Markets

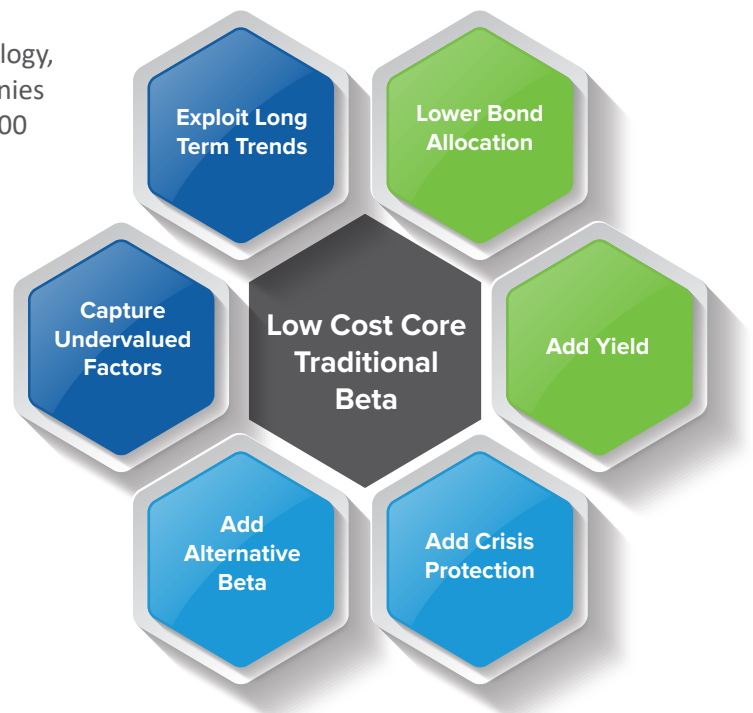
With today's value vs. growth valuation gap at an extreme, the stage is set for a potentially historic outperformance of value relative to growth over the coming decade. Within equities we seek to capture these undervalued markets.

### Add Crisis Protection

We use long duration treasuries combined with gold to help mitigate equity drawdowns.

### Add Alternative Beta

Adding high return assets with low correlation to our core traditional assets, we seek to maintain returns with lower levels of risk.



# Investment Consulting Team

Our investment consulting team, made up of industry professionals with decades of experience, provides our advisors with assistance and services across three key areas:

## Client/Prospect Conversion:

- Identify an appropriate Wealthcare strategy for your client/prospect through the use of our [Transition Analysis Report](#).
- Diagnose the client/prospects current portfolio through [Comparative Analysis](#)
- Use our [Tax Alpha Report](#) to compare traditional account-based rebalancing to our household-based rebalancing technique and quantify the value add in basis points.



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## Investment Strategy Consultation:

We offer a wide range of investment choices to advisors and their client/prospects with our 500+ investment strategies. While risk level often needs to change over the course of a plan, our goal is to help you select a strategy that puts the clients investments within the context of their goals.

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Wealthcare's investment consulting team is here to help! We have a consultative process in place through which you can leverage our expertise to help you further define the investment strategy and prepare investment proposals for client/prospect meetings.

To learn more about the services we provide, contact us at [investmentconsulting@wealthcarecapital.com](mailto:investmentconsulting@wealthcarecapital.com).



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GDX360® is Wealthcare's fiduciary process that integrates goals-based planning with investment implementation that includes cost and tax management services designed to put client first.

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