GDX360 | Resilient Strategy

In an era of historically low yields, muted projected returns, and a challenging economic landscape, adhereing 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 diliemma Wealthcare created the Resilient Strategy.

Resilient Strategy Thesis:

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

Key Portfolio Positioning:

Lower Bond Allocation

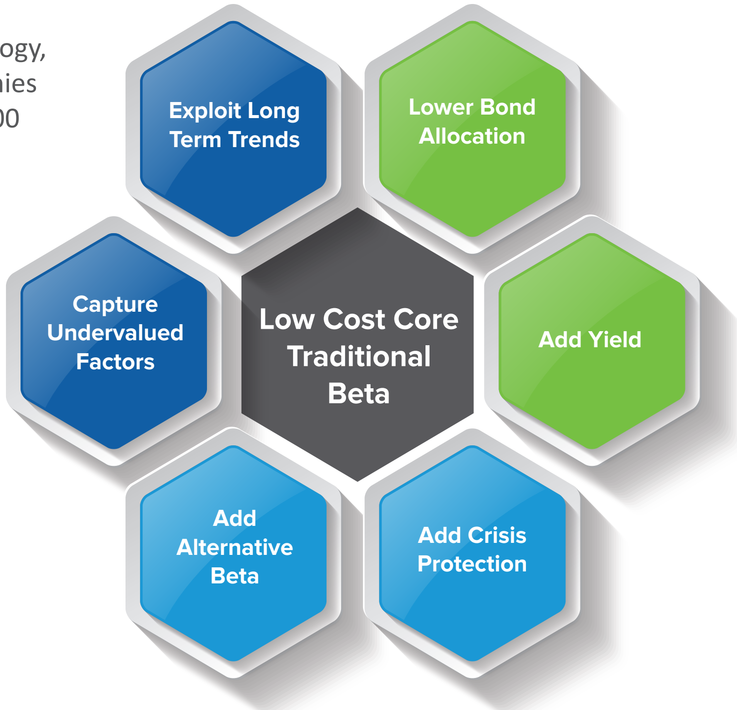
The portfolio prudently lowers capital allocated to bonds, because lower treasury yields should translate to lower bond returns.

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.

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.

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.

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