WEALTHCARE
financial guidance for life

IT ALL STARTS WITH A GREAT CONVERSATION...

A conversation that helps you visualize your most important goals and helps your advisor create a life plan for achieving those goals.

DREAM BIG

Do you like to travel? How will you pay for your children's education? How much should you be saving? What exactly does "comfortable" retirement look like to you? You'll cover these topics — and more — with your Wealthcare advisor. And together you will create your personal plan.

Our objective is to inspire and guide you toward achieving the life of your dreams. Your Wealthcare advisor will help you define your life goals and most importantly, they'll guide you toward achieving them.

STAY ON COURSE

We'll be monitoring your progress along the way so you'll always know where you currently stand and where you are going.

The Wealthcare process is **YOU-driven...not market-driven**. As your circumstances or goals change, we work with you to make appropriate adjustments. Whatever life events come your way — from expanding your family to buying a vacation home — we monitor and measure each event against its financial impact on your plan.

CONVERSATION → GOALS → PLAN → MONITORING → **FINANCIAL CONFIDENCE**

ENJOY A FULFILLING LIFE NOW

We don't believe you should make unnecessary sacrifices in life, or take unnecessary risk.

Imagine your advisor actually recommending that you — **spend more. Or Save less. Retire earlier. Or Take less investment risk.**

When your plan is inside the Comfort Zone®, you can be confident you will arrive at your desired financial destination. Our singular purpose is to help you make the most of your life.

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