WEALTHCARE
financial guidance for life

Whether you're thinking about going independent or are looking to improve your business model, Wealthcare offers flexible solutions to help advisors scale, create enterprise value and improve client experience.

The Wealthcare Experience

Starting as a technology company 20 years ago, today Wealthcare is a registered investment advisory (RIA) firm with $4 billion in AUM and serving more than 130 affiliated advisors. We work with advisors at any growth stage—those looking to break away, move to a fee-based model, or simply grow their existing independent practice.

We offer advisors the industry's only integrated goals-based planning solution along with a full range of business operations support—including Compliance, Marketing, and Practice Management— as well as access to our investment models and portfolio management services, so you can focus your time on revenue-generating activities.

The **only** integrated goals-based planning solution.

170+
AFFILIATED ADVISORS

$5+ Billion
TOTAL ASSETS

3x

Faster Growth
The Wealthcare approach has been shown to generate advisor growth at rates **3-4 times the industry average.**

Cutting Edge Technology
Wealthcare provides you with best-in-class technology solutions at each touchpoint in your workflow.

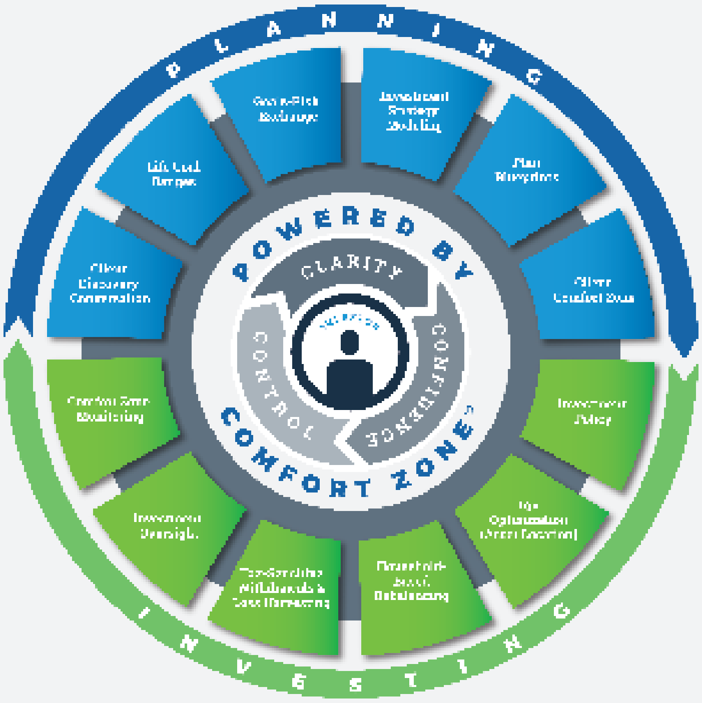
Improved Client Experience
Our model offers an elevated advisory experience that drives client loyalty, longevity and referrals.

Flexible Affiliation Models
We offer fully open and customizable options, and a simple fee structure, giving you complete control over your business.

Operating Leverage and Scale
We help you to build enterprise value and scale, and to develop a succession plan to realize the full value of the business you've worked hard to build.

Practice Transformation
Our experienced team takes a personalized, consultative approach – whether you're just going independent, need help transitioning to a fee based model, or want to optimize your operations.

Our Differentiated Client Experience



GDX360®

GDX360 + Comfort Zone

Wealthcare's proprietary "Goals-Driven Experience" GDX360® platform brings financial planning, investment strategies, operations, compliance, and goals-driven advice into one comprehensive offering. GDX360 provides an industry leading fiduciary process for advisors and enables you to deliver a consistent and repeatable client experience.

Our patented Comfort Zone® powers an interactive planning experience with step-by-step tools that help clients see how their financial decisions connect to their goals and facilitates clients playing an active role in their financial journey. Together, GDX360 and Comfort Zone enable you to develop stronger relationships, maximizing client loyalty.

Choose Your Path

Wealthcare supports your independence and lets you stay in the driver's seat in running your business. Still, we know that change can be scary. That's why our onboarding team does the heavy lifting to make transitioning to Wealthcare stress-free.

We give you the flexibility to access GDX360 and our full suite of practice management tools in the way that best fits your needs:

Join our fee only RIA: Combine the independent, entrepreneurial feel of running your own business with the corporate support and benefits of being an employee.

Open your own RIA: We'll partner with you to help you build a thriving, scalable practice rooted in repeatable processes and personalized client experiences.

Stay with your RIA: You can plug into the full power of GDX360 – including planning, investing, portfolio management, and tax-efficient asset allocation – without joining Wealthcare.

Join our hybrid RIA: Keep your dually registered status while taking advantage of our support services and utilizing GDX360.

Partner with Us: RIAs and investment firms can get plug-and-play access to our integrated goals-based planning and investing platform, GDX360.

Support Programs & Teams

- Compliance support
- Recruiting resources
- Advisor training and practice management
- Planning infrastructure
- Goals-driven portfolio management
- Marketing and branding services
- Advisory billing
- Available capital and financing
- Office set up and support

Contact us to get started!

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Or visit our website to learn more
wealthcaregdx.com