

LIVING WELL, INVESTING WELL

THE WEALTHCARE WAY

As an investor, you have financial goals; as an individual, you have a vision of a life well-lived. Far too often, investing is completely disconnected from your life goals. At Wealthcare we strive to keep them in balance.

We believe in investing well and living well. Your Wealthcare Direct team will use our patented goals-based **GDX360**[®] process which synchronizes financial planning, investment strategies, and advice, empowering you to make better decisions to help reach your life goals.



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▶ WEALTHCARE PLANNING:

- Your Wealthcare Direct team will evaluate your life goals, investment strategy, assets, and other financial resources (today and in the future) and design a GDX360 plan to help you reach them.



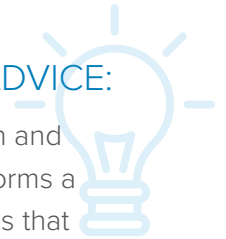
▶ INVESTMENT STRATEGIES:

- We will invest your money using a strategy designed to align your investment risk with your goals minimizing cost while managing the downside risk of equities. We also look to use our household-level investing programs which focus on reducing your taxes and trading costs.



▶ ONGOING MONITORING & ADVICE:

- The GDX360 process takes the plan and investment strategy inputs and performs a sophisticated "stress testing" process that simulates 1,000 lifetimes under a variety of market conditions. The plan's "confidence" or "comfort" is the percentage of the 1,000 simulations that met or exceeded your goals. We call this result your "**Comfort Zone**".
- Life changes. Markets shift. Dreams evolve and so do goals and priorities. Your Wealthcare plan will change right along with them. This is not a "set it and forget it" plan. Our Wealthcare Direct team provides ongoing annual reviews, plan updates and Comfort Zone monitoring to help you keep your financial plan in alignment with current circumstances.



Wealthcare Direct, a positive financial experience tailored to your life that is driven by your goals.

So go ahead LIVE WELL.
We'll help you figure out the rest.

WEALTHCARE
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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 clients first. This content is intended to provide general information about GDX360® as a Wealthcare service. It is not intended to offer or deliver investment advice in any way. Information regarding investment services are provided solely to gain an understanding of our investment philosophy, our strategies and to be able to contact us for further information.