

YOUR DREAMS TAKE ON
REAL MEANING WITHIN THE
WEALTHCARE PROCESS.

WHAT'S WEALTHCARE

Wealthcare is a financial advisory platform that aligns your money with what matters most to you, empowering you to make better decisions to help you achieve your life goals.

WHAT YOU CAN EXPECT FROM WEALTHCARE

✓ RELEVANT FINANCIAL PLANNING

We believe true financial success is built on what wealth truly represents to our clients. By tying every aspect of your plan to your desired lifestyle and dreams, we make wealth management relevant and personal — so you always know where you stand in your life.

✓ FREEDOM TO DREAM BIG

With the help of your Wealthcare advisor, you will explore your highest aspirations and will imagine the life you may have never thought possible before.

✓ A DIFFERENT APPROACH TO RISK EXPOSURE

At Wealthcare, we don't think you have to maximize your risk exposure to achieve your goals — and our process backs up this belief.

✓ COMFORT ZONE®

You can always have sufficient confidence in your plan because we are constantly performing analytics to ensure your success. We call this being in the Comfort Zone.® The Comfort Zone measures the probability of reaching your financial goals. And it also alerts you if you veer off course.

