The Comfort Zone®

Redefine the Advisor/Client Experience

WEALTHCARE
financial guidance for life

Advisor value is assessed on the relationships they build with clients and their ability to help them navigate the complexities of their financial lives.

To differentiate themselves in an increasingly competitive market, advisors must deliver a superior, dynamic, and data-driven experience that puts the client and their needs at the center of their financial plan.

Implementing a digital and simplified planning approach can be a game-changer for advisors looking to truly stand out in the industry and provide a next-level service offering.

GDX360® is Wealthcare's values-based, goals-driven model that aligns your client's wealth with what matters to them most. **Powering this process is Weathcare's patented platform, called the Comfort Zone®, which offers clients a stunning visual display of how they're progressing toward their goals.**

This powerful experience illustrates your client's goals, dreams, assets, and investments in a sophisticated yet user-friendly dashboard that simplifies the big picture, creates ample opportunity for more meaningful conversations, and keeps clients focused what they can control.

The Comfort Zone allows advisors to illustrate a client's life journey in a way that is easy to understand — even for those clients without a strong financial background.

Our Competitive Advantage

Advisors utilizing the Comfort Zone in their practice can experience a true competitive advantage over other wealth managers with their ability to help clients:

Simplify the complexities of their financial lives

Shift attention away from the granularities of return management and portfolio performance

Adapt and adjust plans quickly based on market conditions and their life's circumstances

The Comfort Zone Solution

Goals are not fixed data points. GDX360 is designed to capture each client's life goals, assets, risk profile and investment choices in a way that offers a comfortable range between "ideal" and "acceptable."

This approach – visualized as the **"Comfort Zone"** – alleviates unnecessary financial anxiety and encourages clients to feel confident in their financial future while enjoying their lives today. It allows clients to view their finances in a more holistic manner with a high-level understanding around how they are tracking towards their goals.

Wealthcare's client-centric approach empowers advisors to deliver three key elements of a next-level client experience:

1

Clarity
There is nothing more satisfying than that "a-ha" moment when a client visualizes how their financial plan aligns with their goals.
The Comfort Zone is dynamic, visually engaging, and creates ample opportunity for meaningful conversations.

2

Confidence
Seeing is believing. The GDX360 process starts with a conversation that is realized through the synchronization of financial planning with investments; clients can access a clear picture of their financial future and feel empowered through their choices.

3

Control
As life presents challenges, clients see how small course corrections are usually all that is needed to keep their plan on track. GDX360's capabilities foster stronger relationships where advisors can become both accountability partner and sounding board for clients who want to maintain better control of their financial futures.

By delivering on these elements, advisors can exceed the expectations of their clients and build stronger relationships while scaling their business for future growth.

Meaningful Relationships

Imagine a conversation with clients that starts with their dreams and life goals. Rather than a typical intake where you start with spreadsheets and numbers, you break the ice with the question: "What are your hopes and dreams for your life?"

Comfort Zone allows advisors to change the narrative around financial planning and build deeper, meaningful relationships with clients from their very first meeting. With Comfort Zone at the center of the overall planning process, you rewrite the rules around traditional financial advisor relationships, fostering confidence and trust that is immeasurable and leads to real results.

Advisors with Comfort Zone enjoy:

- The ease of having **candid conversations** about money
- **Confidence of simplifying** complex financial situations using a stunning visual tool
- Natural ways to **stay connected** when working towards goals or reaching milestones
- The ability to **proactively** see how your clients are tracking against their goals
- **Condensing** the planning process from hours to minutes
- The excitement of clients who share their **satisfaction** with friends and family

Comfort Zone helps you stand apart from the crowd with the most innovative technology resources that balance automation with personalization.

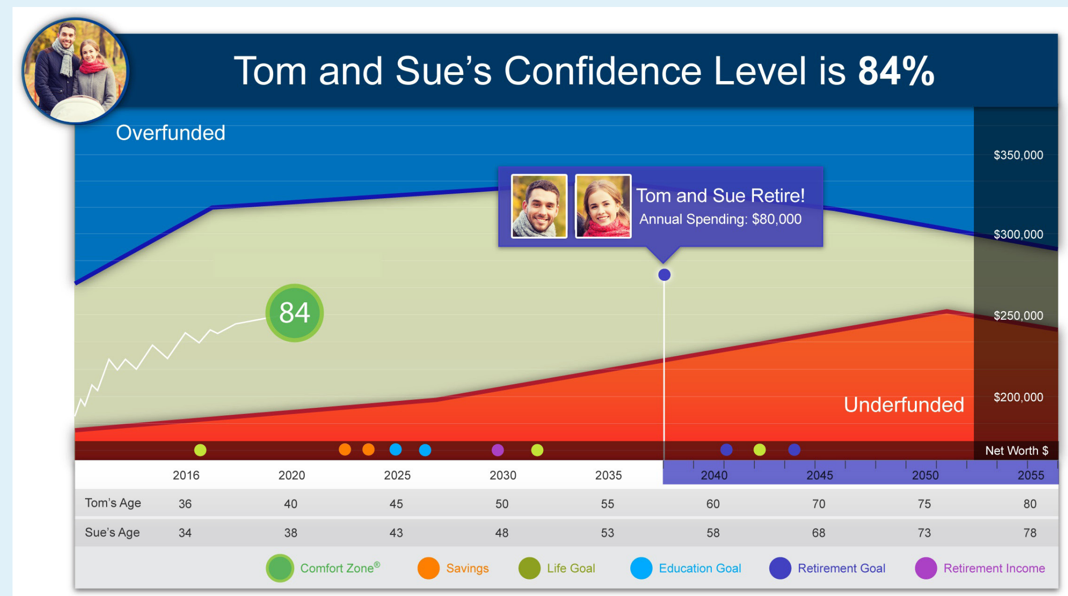
Client Confidence

Comfort Zone is a powerful, visually appealing illustration that shows the likelihood of a client exceeding their life goals. It also produces a different conversation with clients...one that looks ahead at pursuing goals rather than looking through the rear-view mirror at investment performance.

Life is not black or white, and neither are your client's finances. It's not a defined math problem to solve nor is it one size fits all. With Wealthcare's GDX360 and Comfort Zone, our goal is not to measure financial success with laser precision. It's about balancing saving and spending so that your clients can plan for tomorrow and live for today. By determining a comfortable range of possible outcomes between "ideal" and "acceptable" and staying within that range, advisors can have enough confidence that whatever happens in the world – politically, legislatively, economically – they can offer clients advice on making small adjustments that ensure they always remain within their "comfort zone." This approach can offer great relief to clients who are often envisioning a life of sacrifice over balance.

Key Features

- High-level yet comprehensive view of your clients' entire financial picture
- A visually stunning display for client meetings that encourages conversation and engagement
- Personalized Comfort Zone numbers created through Monte Carlo simulations
- A dynamic dashboard that adjusts to modified goals in real time



Comfort Zone gives clients room to explore their true aspirations and envision what's possible.

Real Results

For You

- Builds comfort and trust more quickly with clients
- Elevates conversation beyond the numbers
- Drives referrals from enthusiastic, satisfied clients
- Prioritizes financial topics and creates an environment of open conversations
- Conveys a tremendous value that drives loyalty and retention

For Your Client

- Clarity, Confidence and Control of their financial picture
- Education and encouragement among all members of the household to play an active role in their financial journey
- Easy virtual access to a visual dashboard and all their information available on-demand
- Confidence in their advisor and in their own decisions

Comfort Zone's interactive planning experience with step-by-step tools enables clients to see how their financial decisions connect to their goals and facilitates clients playing a more active role in their financial journey. Together, GDX360 and Comfort Zone help you develop stronger relationships, maximize client loyalty, build new business, and continue to scale as you grow.

Why Now?

Helps ease client concerns during market volatility

Uncovers opportunities to maximize tax and investment strategies

Differentiates firms from the competition with an unmatched client experience

Uses technology to bridge the gap between automation and personalization

Provides advisors with the confidence they need to retain clients and drive new business

Contact us to get started!

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