

CMA Swapping - 2023

Please Note: Any plans that were still on the 2021 assumptions were automatically moved to the 2022 assumptions. All plan results on the 2022 assumptions will remain the same until you take special Capital Market Assumption (CMA) swapping action. **New profiles or plans** created on new clients **will not** have the **swap back and forth** functionality and will automatically use the newest CMA's. Any plans not swapped forward during the next year will be automatically converted in 2024 when we retire the 2022 CMA's.

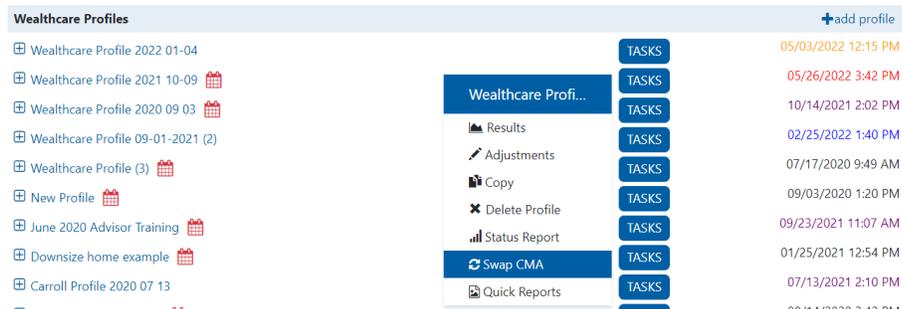
Advisor Dashboard:

- A **2022 CMA icon**  allows you to easily identify households with a Recommended Working Plan/Wealthcare Profile of Record still on the 2022 CMA's.

 Average, John	81	Active Domestic Core - Moderate Growth	250798864	\$778,700		05/17/2022
 Boomer, Bobby	98	Domestic CorePlus Strategic Active NTF - Conservative	250785605	\$985,000		05/12/2022

Plan List:

- A **Swap CMA** function appears in the task menu to the right of the client's profile or plan on the plan list page. This **Swap CMA** function lets users swap **existing** plans or profiles forward and backward.
- **Existing** plans on **old** assumptions are easily identified by the **2022 CMA icon** 
- **Helpful Hint:** Make a copy of your Profile/Plan/POR (and save a complete report) before you initiate the **CMA SWAP** to retain the original.



The screenshot shows the 'Wealthcare Profiles' section of a software interface. On the left, there is a list of profiles with various icons, including calendar icons indicating dates. On the right, a 'TASKS' menu is open for a selected profile, listing actions such as 'Results', 'Adjustments', 'Copy', 'Delete Profile', 'Status Report', 'Swap CMA' (which is highlighted in blue), and 'Quick Reports'. To the right of the tasks menu, a vertical list of dates and times is visible, such as '05/03/2022 12:15 PM' and '05/26/2022 3:42 PM'.

Adjustments Page:

- The **Allocation** icon on the adjustments page with notify advisors if the CMA for plan or profile is out-of-date

Select Allocation

Selected Allocation: *Active Domestic Core - Moderate Growth

Model Allocations	Equity	Risk
WCM Legacy - Aggressive Growth	65 percent	12.9 percent
WCM Legacy - Balanced		
WCM Legacy - Balanced Growth		
WCM Legacy - Balanced Income		
WCM Legacy - Growth		
WCM Legacy - Risk Averse		
Client Allocations	Return	Yield
*Active Domestic Core - Balanced	9.7 percent	3.9 percent
*Active Domestic Core - Conservative		
*Active Domestic Core - Growth		
*Active Domestic Core - Moderate Growth		
*Active Domestic CorePlus - Moderate Growth		
*Domestic CorePlus DFA - Conservative		
*Domestic Resilient - Balanced		

Expense	CMA Status
47 basis points	out-of-date

Cancel Change

Global Swap

- You can swap all plans and profiles on your entire book of business at once by hovering over your name in the upper right-hand corner of GDX360 > click on the preferences > swap plans.

Investor Questionnaire Advisor Uri

Click or copy and paste the hyperlink above to provide anonymous Investor Questionnaire access to prospective clients that have not been added to the system. This process creates a prospect that will automatically be added to your client list. To use IQ with an existing client, use the 'Client Data Association' option on the Client Tasks menu.

Default Investment Program: Domestic Core PG v2 Save

Performance Report Delivery: No performance report Save

Swap Plans

Swap the CMA of all plans across all clients forward!

** New clients created under this advisor will inherit this investment program.
** A client's investment program can be changed later in the Strategies tab.

For more information on Wealthcare's 2023 Capital Market Assumptions, please visit the **CMA Landing Page** available in the Investment section of the Resources tab or contact support@wealthcarecapital.com.