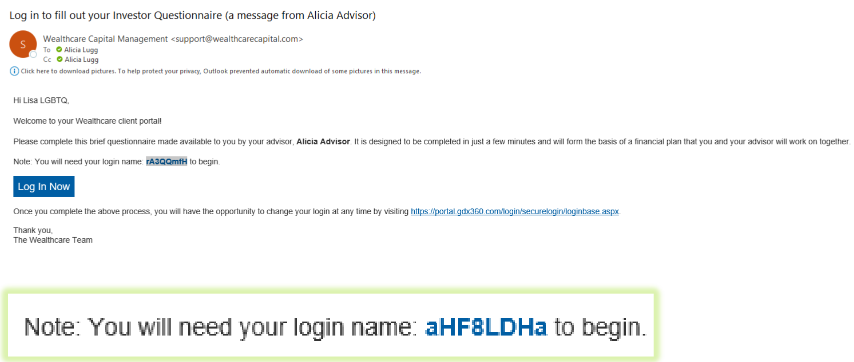
GDX360 Investor Questionnaire

I received an Investor Questionnaire email invitation from my advisor…..now what?

Make sure you write down or copy your ***login name***. You will need it to begin. Your initial login name is generated by the system and may be changed after the initial enrollment process.

Click the ***Log In Now*** button to start.


Log in to fill out your Investor Questionnaire (a message from Alicia Advisor)

Wealthcare Capital Management <support@wealthcarecapital.com>
To Alicia Lugg
Cc Alicia Lugg

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Hi Lisa LGBTQ,

Welcome to your Wealthcare client portal!

Please complete this brief questionnaire made available to you by your advisor, **Alicia Advisor**. It is designed to be completed in just a few minutes and will form the basis of a financial plan that you and your advisor will work on together.

Note: You will need your login name: **rA3QQmfH** to begin.

Log In Now

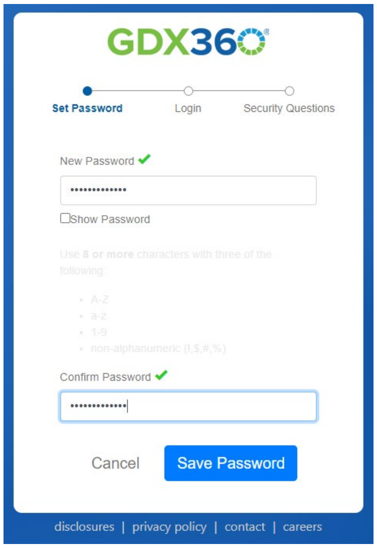
Once you complete the above process, you will have the opportunity to change your login at any time by visiting https://portal.gdx360.com/login/securelogin/loginbase.aspx.

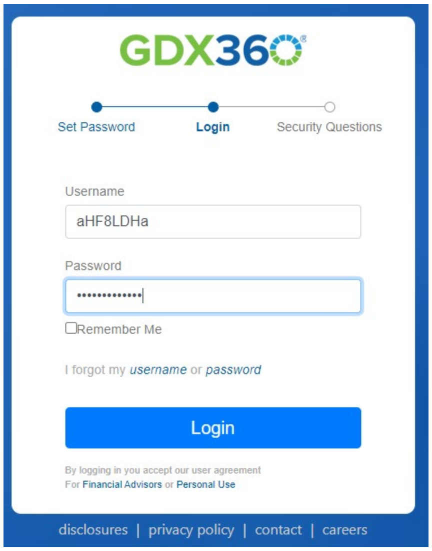
Thank you,
The Wealthcare Team

Note: You will need your login name: **aHF8LDHa** to begin.

Before you can access the investor questionnaire you must complete the 3-step enrollment process.

The username and password you use today will be what you use in the future to login to your GDX360 Client Portal. Your username, password, and security questions can be changed in your portal at any time by logging in and choosing ***Preferences*** from the dropdown next to your name.



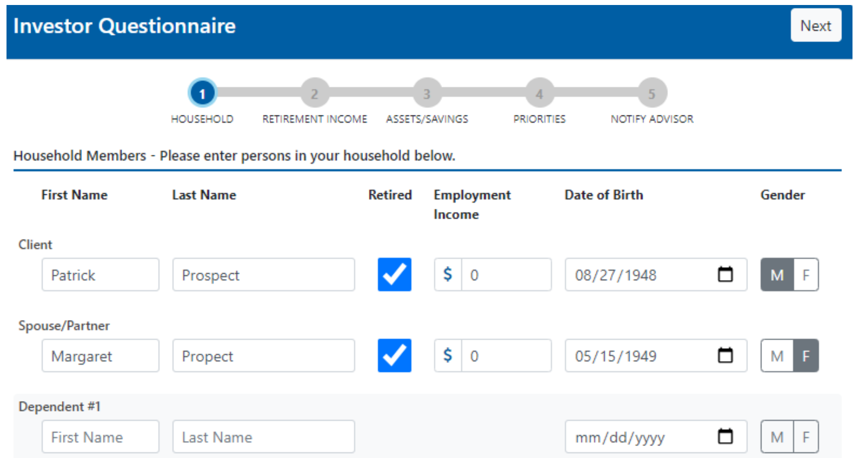


This questionnaire is designed to be completed in just a few minutes and will provide your advisor with some basic personal and financial information. Your advisor will work with you to create a financial plan tailored to your unique mix of lifestyle goals, current assets, expected future financial resources (ie... pension, Social Security, inheritance, sale of business, etc.), risk tolerance, family dynamics, etc. If there is something that you feel is important for your financial advisor to know but is not included in this questionnaire, make a note to bring it up during your follow up discovery conversation.

Step 1 - Household Information

Your Investor Questionnaire should already have the Primary Household Member's information populated. Please verify that all information is correct and add a spouse/partner and any dependents information. Check retired or enter your gross annual employment income.

Once this page is complete, Click ***Next***



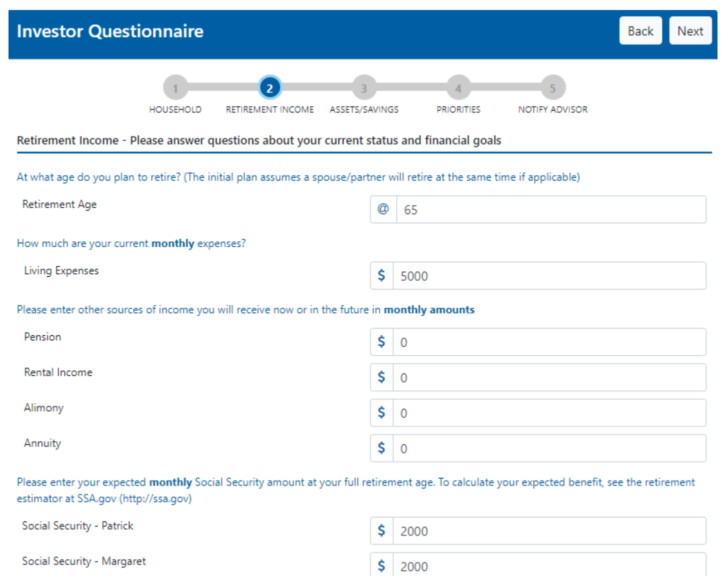
Step 2 - Retirement Income

Please answer all questions that pertain to you and your current financial status and goals.

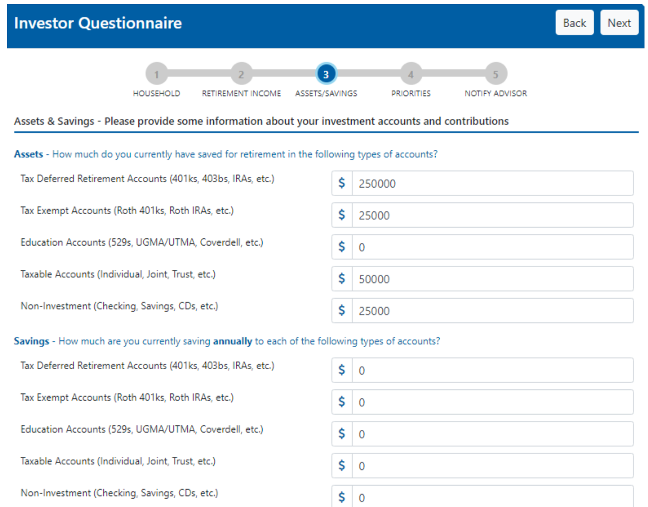
If a field does not apply to you, leave zero and move on to the next question.

If you have additional Sources of Income that are not listed, please make a note to mention to your advisor during your next conversation.

Once this page is complete, Click ***Next***



Step 3 - Assets/Savings

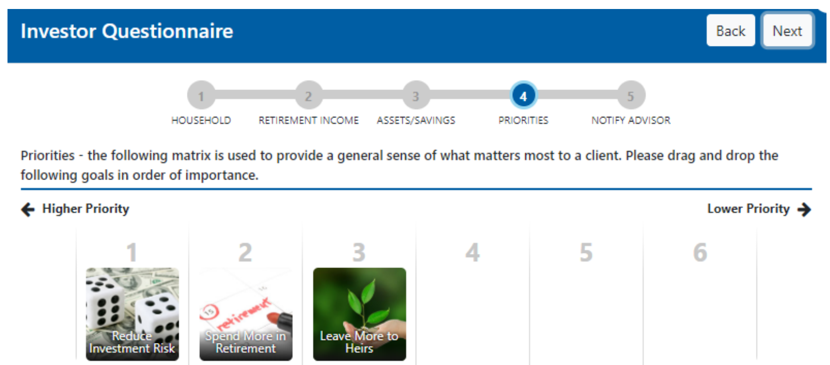


In this section, the advisor is looking for present financial resources that are at your disposal and the annual amount you are currently contributing to them.

If you have additional assets or currently saving to an account that is not listed, please make a note to mention to your advisor during your next conversation.

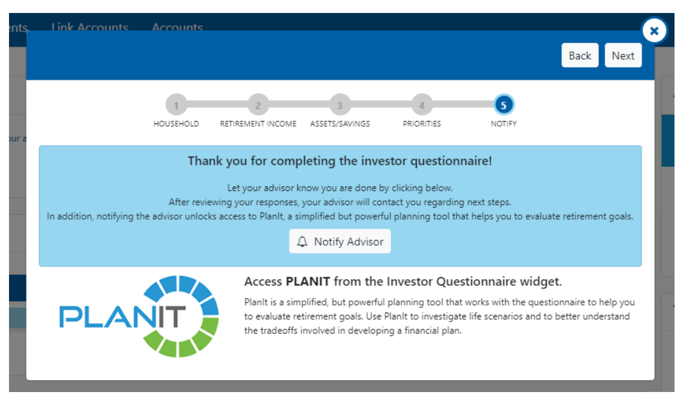
Once this page is complete, Click ***Next***

Step 4 - Priorities



For each of the primary priorities, we want to know if you would compromise other goals (or more accurately, if you don't view it as compromise) to achieve that goal. Let us consider the investment risk lever. To reduce the amount of investment risk (equity exposure), would you be willing to spend less in retirement? If your answer is yes, then Investment Risk would be given a higher priority.

Once this page is complete, Click ***Next***



Step 5 – Notify Advisor

If you are satisfied with your responses *notify your advisor* that you have completed the questionnaire by clicking the ***Notify Advisor*** button.

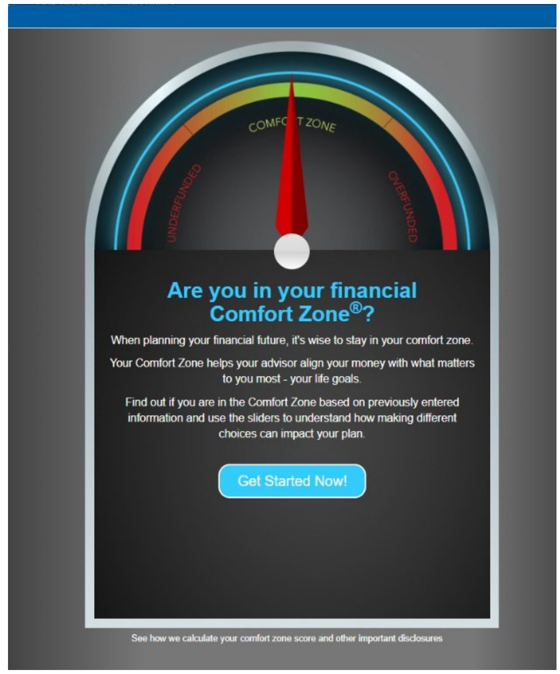
Once you have notified your advisor, Click ***Close.***

Plan It

Once you have completed your questionnaire and notified your advisor, a link to our ***PlanIt*** tool will appear.

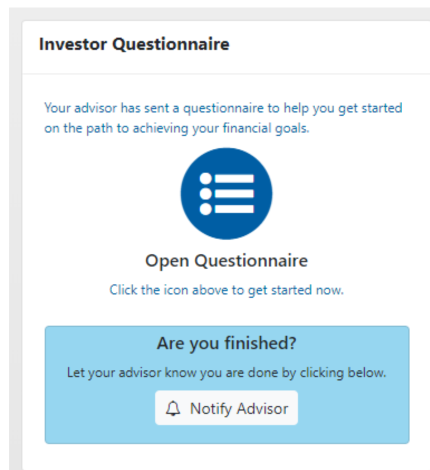
What is PlanIt? It is a simplified, interactive planning tool that works with the questionnaire to help you evaluate your retirement goals. Use PlanIt to investigate life scenarios and to better understand the tradeoffs involved in developing a financial plan.

If you do not want to take part in the PlanIt simulator, click on the X to close the window.



Investor Questionnaire Widget

If you are not finished completing your questionnaire, you can close it out and come back to it at another time by logging into your client portal and choosing the ***Open Questionnaire Icon*** in the Investor Questionnaire Widget.



Thank you for completing your Investor Questionnaire. Your advisor will be reaching out to you shortly to discuss the next steps.