WEALTHCARE DIRECT

What Happens to You if Something Happens to Me?

Do you know what happens in the event that I can't come to work tomorrow? It could be due to a car accident, a stroke, or a bout with cancer. These events are not unusual and happen all the time. In any of these cases, I may not be able to assist you for weeks, months, or maybe forever. I have protected you and your family for the what-if's in your life by creating your **GDX360®** plan. I want to share with you my **continuity plan** to protect you for the what-if's in my life.

My Continuity Plan

As an investor you have spent time trying to find the right advisor to entrust your hard-earned money to, and you have chosen me. Together we have evaluated your life goals, investment strategy, assets, and other financial resources (today and in the future) and designed a GDX360 plan with a goal to help you reach them. It is natural for you to have fear that if something happened to me, all that hard work and planning would be lost. You may wonder:

"Does my advisor have someone who can take over the relationship should something happen to them?"

"Are they experienced?"

"Do they have the capacity to service me right away?"

"Are they familiar with the planning and investing process I have come to rely on from my advisor?"

My answer to these questions is YES! My solution is called Wealthcare Direct.

What is Wealthcare Direct?

- It is simply an extension of my current financial services model. An experienced internal Wealthcare team of financial professionals (that currently assist me on the back end) will take over the management of your plan and investments to ensure the continued delivery of the GDX360 process you are already familiar with.

- Life changes. Markets shift. Dreams evolve and so do goals and priorities. Your Wealthcare plan will continue to change right along with them. The Wealthcare Direct team will provide ongoing annual virtual reviews, plan updates, and Comfort Zone® monitoring to help you keep your financial plan in alignment with current circumstances.

Wealthcare Direct, a continuity plan designed to seamlessly continue delivering the life planning advice that you are already comfortable with using a process driven by your personalized goals and needs.

wealthcarepc.com

Richard L. Bartholomew II, MBA, CFP® 425 Town Plaza Avenue, Suite 250, Ponte Vedra Beach, FL 32081, (904) 834-1062

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.