The GDX360® Difference

Free up your time to grow your business.

WEALTHCARE
financial guidance for life

Why GDX360?

Simplicity + Flexibility in the Planning and Investing Process

GDX360 is for Advisors who understand the increasing demands of a competitive industry where client expectations are high, and technology continues to evolve. It is our goals-based wealth management platform that synchronizes financial planning, investment strategies, and compliance into a seamless and dynamic experience designed to amplify your business.

Using Wealthcare's patented, client-centric approach, advisors can deliver the three elements of a next-level planning experience:

1

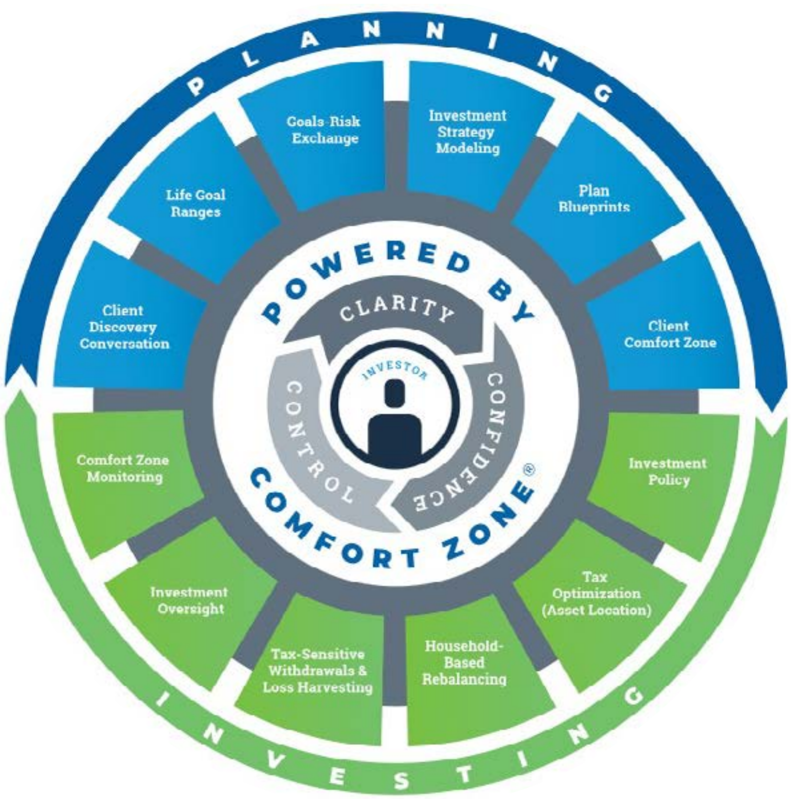
Clarity
There is nothing more satisfying than that "a-ha" moment when a client visualizes how their financial plan aligns with their goals. GDX360's Comfort Zone is dynamic, visually engaging, and creates ample opportunity for meaningful conversations.

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 changes, clients feel informed every step of the way. GDX360's capabilities foster stronger relationships where advisors can become both an accountability partner and a sounding board for clients who want to maintain better control of their financial futures.



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The GDX360 Solution

The Problem

Advisors struggle to differentiate themselves in a highly competitive market; elevating client experience is key.

Time is a precious commodity and advisors must continuously find ways to streamline operations without sacrificing quality of care.

Clients have increasingly high expectations for efficiency, personalized service, and quick response times.

Advisors require technology that helps tell the right story for each client; there is no one-size-fits-all planning and investing platform that best suits every client or advisor.

Easy to use. It starts with an open conversation to discover what matters most to each client. GDX360 then incorporates those goals into a financial planning model with a flexible investment choice framework.

Aligns with client goals in a way that is visually satisfying and motivating. Our Comfort Zone dashboard tells a clear picture that clients can understand.

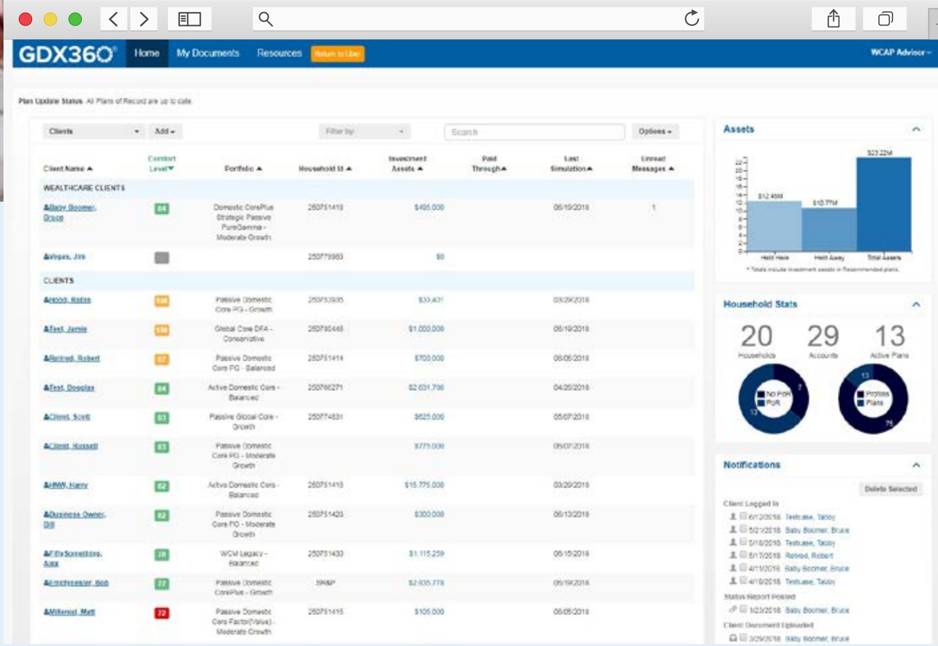
Fosters communication and helps advisors build better relationships. Financial planning is never one-and-done. The GDX360 platform is dynamic and shows progress as markets change and life's milestones and unexpected circumstances occur.

Streamlines planning and investing activities. The GDX360 process gives advisors more time to focus on nurturing existing client relationships and growing their businesses.

Allows you to scale your business and add value to clients. Why compromise? GDX360 gives you two pieces of low-hanging fruit designed to add ongoing value by helping clients keep more of what they earn: household-level portfolio management and asset location strategies help reduce transaction costs, and tax-efficient withdrawal strategies to reduce taxes. These strategies, automated by GDX360, make scaling your business easier without draining your time.

Provides compliance you can count on. GDX360 provides investment policy tools that strengthen compliance and promote fiduciary responsibility. Rigorous investment policy processes in GDX360 help put you and your clients on the same page.

Household-level portfolio rebalancing offers greater flexibility. Wealthcare's TRACM® system primarily does portfolio rebalancing at the household level, allowing us to look across an entire client's household in an effort to determine the most cost-effective way to rebalance when necessary. This gives us greater flexibility with trading and rebalancing, and can lower trading costs and reduce tax impact.



How GDX360 Works

Like all relationships, it starts with a handshake, an introduction, and an honest dialogue about what matters the most in life. From there, the conversation turns to investments and a strategy that reflects their goals.

GDX360 is a powerful tool for advisors to elevate their ability to connect with clients on a personal level and offer results in a tangible way that makes an unforgettable first impression and a lasting foundation for a lifetime.

Key Features

GDXIQ

Is a client-facing online questionnaire designed to be completed in just a few minutes and will provide you with some basic personal and financial information for a prospect. These inputs will form the basis of a GDX360 plan.

Interactive Comfort Zone

Our patented Comfort Zone is an interactive planning experience with step-by-step tools that help clients see how their financial decisions connect to their goals and facilitates clients playing an active role in their financial journey. Together, GDX360 and Comfort Zone enable you to develop stronger relationships, maximizing client loyalty.

Scenario Builder

The scenario builder (what-if's) allows you to build up to 4 additional 'scenarios' to measure the impact of other potential adjustments the client could make, to impact the confidence of the plan.

Interactive Adjustment Page

Recently updated with a modern, streamlined interface which allows advisors to edit goals, allocation periods, and investment model selection on the fly automatically calculating the confidence score after every change. Supports Single Plan Mode, Profile Mode (Ideal, Recommended and Acceptable) and Scenario Mode.

Proactive Planning

Financial planning software has traditionally operated on a reactive model whereby the advisor is alerted after something meaningful has happened. GDX360 is the exception. We have a forecasting model to identify plans that are at risk of exiting the comfort zone within the next year. This model labeled "Chance of Falling Outside of the Comfort Zone," is perhaps more accurately described as a probability of adjustment.

Cash-flow Detail Page

This year-by-year view of cash-flows by person in todays and actual dollars allows the advisor to show a client a visual representation of plan goals and their timing.

Percentile Rankings and Historical Audit

The percentile rankings screen works for showing the results of a risk change. Historical Audit is also a great way to introduce prospects and clients to the idea of stress testing their financial plan. Using Historical Audit to show clients how their plan would have held up during different economic environments in the past is another benefit of this feature.

Investment Choice and Collateral

We offer a wide range of investment choices to advisors and their client/prospects with our 500+ investment strategies all integrated into our GDX360 software and designed to improve investor success in reaching their life goals. Each strategy comes with client brochure and portfolio fact sheet and advisor program and portfolio commentary.

Investment Policy Ticket (IPT)

We document and implement investment preferences and the client's overall investment strategy in the Investment Policy Ticket (IPT). The IPT provides trade instructions and compliance oversight.

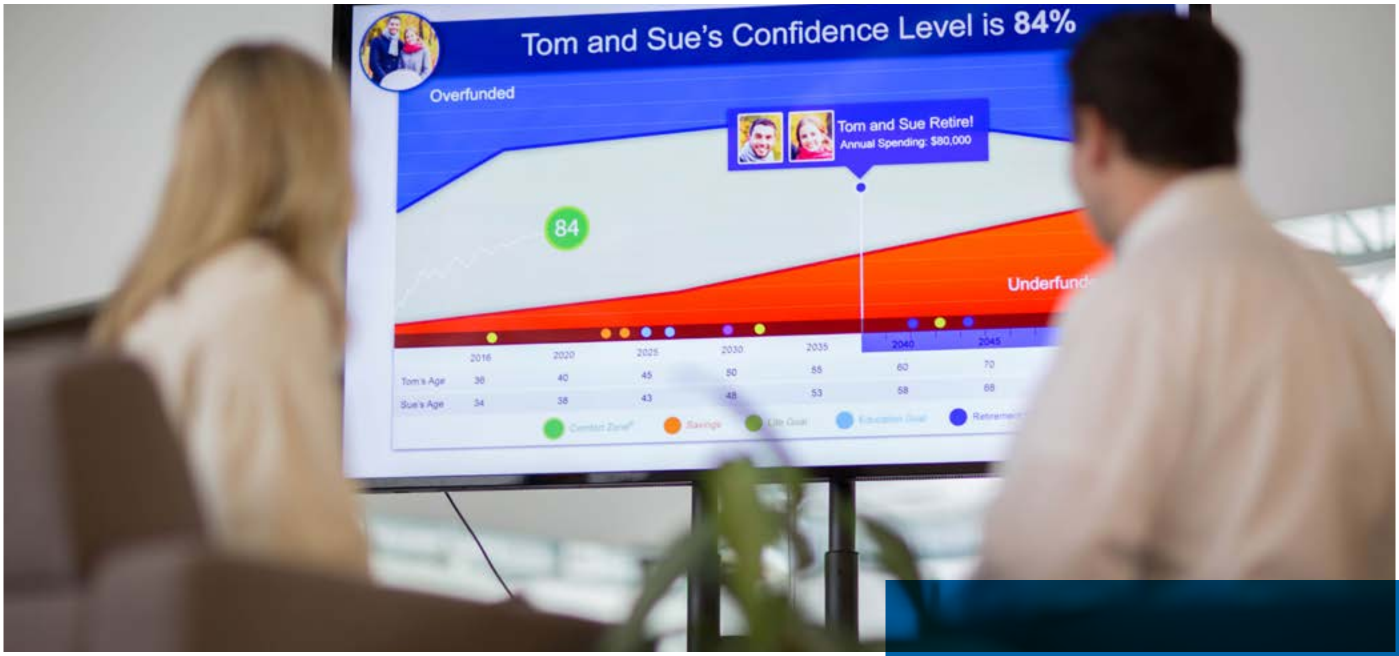
GDX360 Benefits

For You

GDX360 is a differentiator for advisors in a competitive market. It provides you with a synchronized, consistent process that integrates financial planning, investment strategies, monitoring, and advice to help you keep your clients on track to reach their goals. By doing the heavy lifting associated with planning and investing, the GDX360 process frees up time that can be spent on leading both the professional and personal life you want.

For Your Client

Financial guidance tailored to their life and driven by their goals — not the market. This approach allows your clients to live and invest well as with a simple, interactive experience always personalized to their preferences and comfort level.



Wealthcare is both a fee-only SEC registered investment advisor and a hybrid SEC registered investment advisor, both of which deliver a fully integrated, goals-driven planning and investing platform that also features investment management and oversight.

Contact us to get started!

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