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Wealthcare Launches “PlanIt”, A New Client Engagement Tool

PlanIt gives advisors new ways of illustrating firm’s Comfort Zone® concept.

RICHMOND, Va. (March 28, 2019) – Wealthcare, a wealth management innovation company, today announced that it has launched a new client engagement tool called “PlanIt”. This new web-based tool, accessible via <https://planit.gdx360.com>, introduces investors to the firm’s patented and distinctive Comfort Zone® approach, while giving advisors an additional way of prospecting. PlanIt is built into Wealthcare’s financial planning technology, GDX360® (formerly called Financeware), which is available at: www.GDX360.com.

Wealthcare differentiates goals-driven experiences with its advisor-focused GDX360 platform. This approach unites the two pivotal parts of goals-driven advice - planning and investing – in one connected experience that gives advisors new ways to see, manage and grow their business.

“PlanIt gives advisors a simple way to introduce both prospects and clients to the power of our Comfort Zone approach,” said Matt Regan, President of Wealthcare. “It also gives investors a fun, game-like platform to choose various scenarios to see how these scenarios may impact life situations or goals. We’ve heard from our advisors that having additional ways to attract new clients would be beneficial. It also gives advisors the ability to directly import investor-submitted information into GDX360 to continue the planning conversation.”

“PlanIt can be a game changer for the advisor/client relationship. It gives clients a simple way to enter some basic information to see how they’re progressing toward their goals,” said Ryan Oates, Managing Partner of Water Street Financial, a firm affiliated with Wealthcare Advisory Partners LLC. “PlanIt also opens the door to more in-depth conversations between clients and advisors, which can lead to a better client experience. And even a generic answer to the question, ‘Will I be OK?’ can help clients open up about their life goals, and PlanIt can help tear down that wall.”

PlanIt is a web-based planning game where investors provide several inputs, including choosing different life scenarios like “Start a Family”, “Retire Early” or “Start a Business”, among others, to determine a basic Comfort Zone.

Wealthcare’s complete process takes a client’s plan and uses Monte Carlo simulations to run it against 1,000 different lifetimes of hypothetical (yet realistic) market returns. This is used to determine the plan’s probability of exceeding the defined goals. As circumstances change in a client’s life, so too will their Comfort Zone.

About Wealthcare

Wealthcare, a business unit of Financeware, architected its original goals-based planning and investing methodology more than 18 years ago and holds 12 patents on this established goals management process. Powered by its patented Comfort Zone, Wealthcare's approach features innovative, personalized experiences and step-by-step tools that create deeper relationships between advisors and investors. Wealthcare empowers firms and advisors to grow their advisory businesses by providing GDX360 – Wealthcare's proven fiduciary process that seamlessly integrates planning, investing and trading – and a full-suite of practice-management services. Wealthcare Advisory Partners LLC is the firm's Hybrid RIA, which was created in 2014. Wealthcare is a Financeware portfolio company with over \$2 billion in AUM across both RIAs, and serving more than 70 affiliated advisors. Learn more at www.wealthcarecapital.com.

About Financeware

Financeware is the industry's leading fintech platform company focused on driving strategic growth and expansion of innovative companies across the new wealth management space. Established by NewSpring Holdings in 2018, Financeware was born of a need to connect winning solution sets to the fast-moving targets, partners and market relationships playing out across the entire wealth management sector. With a deep history of game-changing wins driven by broad and deep market leadership, the group drives strategic growth of portfolio companies focused in key areas of wealth management, financial advisory, and data management. Financeware's growing portfolio includes Wealthcare, VMS and QUODD. Learn more at www.financeware.com.

About NewSpring Holdings

NewSpring Holdings, the dedicated, diversified holding company within NewSpring, with a strategy focused on control buyouts and platform builds, brings a wealth of knowledge, experience, and resources to take profitable, growing companies to the next level through acquisitions and proven organic methodologies. Founded in 1999, NewSpring partners with the innovators, makers, and operators of high-performing companies in dynamic industries to catalyze new growth and seize compelling opportunities. The Firm manages approximately \$1.7 billion across four distinct strategies covering the spectrum from growth equity and control buyouts to mezzanine debt. Partnering with management teams to help develop their businesses into market leaders, NewSpring identifies opportunities and builds relationships using its network of industry leaders and influencers across a wide array of operational areas and industries. Visit NewSpring at www.newspringcapital.com.

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