



**12** OWNED PATENTS

**2** SYNCHRONIZED PROCESSES

**1** UNIQUE GOALS-DRIVEN EXPERIENCE

## The WealthcareGDX Story

Wealthcare Advisory Partners LLC (Wealthcare) is transforming theoretical plans into life-changing realities using our patented goals-driven process in conjunction with our **GDX360®** software. Wealthcare's turnkey solution for independent financial advisors, **WealthcareGDX®**, takes our goals-driven planning and investment management process complete with a robust digital advisor and client experience and incorporates Wealthcare's human capital of professionals who provide operations, planning, trading and re-balancing, compliance, marketing, and billing support.

As a technology-enabled RIA with a proprietary financial planning process model and patented **Comfort Zone®** technology, our approach integrates and elevates the wealth experience to higher levels for financial advisors and their investors.

## A Look Inside

- **Assets Under Management**
  - WCAP RIA Over \$1.5B
- **West Chester, PA**
- **93 Advisors**
- **3.5 - 1 Staff to advisor ratio**
- **Professional Designations: CFA, CFP®, ChFC®, CASL®, CPA, RPA™**

## OUR REGISTERED INVESTMENT ADVISORY BUSINESSES

- **Multiple Affiliation Options**
  - Fee Only RIA
  - Hybrid RIA with Broker-Dealer Affiliation
- **Nationwide network of advisors reaching clients of various demographics**
- **Full back office support: marketing, operations, trading, planning, billing, and compliance**
- **Numerous custodian options including: Fidelity, Schwab, TD, Pershing, LPL**
- **Investment framework with 50 programs and 500 models**

## GDX360® PLATFORM

- **Powered by Wealthcare's patented **Comfort Zone®****
- **Goal tradeoffs with "Ideal" and "Acceptable" goal ranges**
- **Forward-looking monitoring of client life goals**
- **Household-based trading and rebalancing**
- **Tax optimization: asset location, withdrawals, and loss harvesting**
- **Automated Investment Policy Ticket**

✉ 1065 Andrew Dr. West Chester, PA 19380    🌐 [WealthcareGDX.com](http://WealthcareGDX.com)    ☎ 484.232.5283

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