



12 OWNED PATENTS

2 SYNCHRONIZED PROCESSES

1 UNIQUE GOALS-DRIVEN EXPERIENCE

The WealthcareGDX Story

Wealthcare Capital Management LLC (Wealthcare) has been transforming theoretical plans into life-changing realities using our patented goals-driven process in conjunction with our **GDX360®** software for over 20 years. 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**
 - WCM RIA Over \$928M
- **Corporate Headquarters**
 - Richmond, Virginia
- **21 Advisors**
- **3.5 -1 Staff to advisor ratio**
- **Professional Designations: CFA, CFP®, ChFC®, CASI®, CPA, RPA™**

OUR REGISTERED INVESTMENT ADVISORY BUSINESS

- **Affiliation Option**
 - Fee-Only RIA
- **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**
- **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**