



## **Wealthcare Expands Business Development Team with Two Key Additions**

**WEST CHESTER, PA – March 9, 2021** – [Wealthcare](#), an innovator in wealth management, tech-enabled advisor solutions, and a business unit of Financeware, a NewSpring Holdings platform company, today announced the addition of Michael Murray and Thomas Roberts to its business development team. Both Murray and Roberts join the firm in the position of Senior Vice President of Wealth Management, focusing on educating and recruiting advisors to Wealthcare's turnkey advisor platform which enables them to enhance servicing for their end-clients and build more successful advisor practices.

Murray joins Wealthcare with over two decades of experience in the financial services industry. Prior to this role, he was a Senior Vice President of Business Development at Retiree Income, where he was responsible for sales of all products to financial professionals, with a specific focus on independent broker dealers and RIAs. Prior to that, he led the business development team at Cetera Financial Group and had a successful 15-year career at LPL Financial, ultimately leading their recruiting efforts as National Sales Manager in the West.

"During my first couple of conversations with the Wealthcare team, I immediately felt that it was the right place for me to continue my career," said Murray. "My experience closely aligns with Wealthcare's mission and I was attracted to their supportive company culture, so the decision came naturally. I am excited to be working closely with Tom and the rest of the Wealthcare team to build on the company's success serving financial advisors with the tools and resources they need to succeed."

Roberts is also joining the Wealthcare team leveraging his experiences gained over many years in the wealth management industry. He previously held the role of Vice President of Institutional Sales and Technology Consulting at TD Ameritrade Institutional, where he was responsible for driving new RIA, bank, and breakaway business to the firm, with a focus on technology solutions. With deep experience in how technology can help advisors succeed, he also held positions at Advizr Financial Planning Software and MoneyGuide Pro, which has since been acquired by Envestnet.

"I'm thrilled to welcome two accomplished professionals as Tom and Mike to our team," said Wealthcare President, Matt Regan. "These key additions are a testament to the investment we are making to further accelerate the growth that we are experiencing and our commitment to educating and recruiting even more independent advisors who can benefit from our unique technology-enabled servicing platform. We are confident that they will be a great fit for our team and the advisors we serve. Their collective experience in the financial services and wealth management industries brings a broad perspective to our team as we continue our mission of helping advisors easily deliver goals-driven advice and investment solutions to their clients."

To learn more about Wealthcare, please visit [www.wealthcaregdx.com](http://www.wealthcaregdx.com).

### **About Wealthcare**

For over 20 years Wealthcare, a business unit of Financeware, has enabled advisors to transform theoretical plans into life-changing realities using our patented goals-driven process, GDX360®. Wealthcare holds 12 patents on its 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 advisory firms and independent advisors to grow their business using this proven fiduciary process that seamlessly integrates planning, trading, and investing – and a full-suite of practice-management services. Wealthcare's tech-enabled offering services both fee-only and hybrid advisors through its two RIAs. Wealthcare is a Finaceware platform company with over \$3 billion in AUM across both RIAs and serves more than 130 affiliated advisors. Learn more at [www.wealthcaregdx.com](http://www.wealthcaregdx.com)

#### **About Finaceware**

Finaceware is an industry-leading fintech platform company focused on delivering a robust suite of innovative solutions to the financial services market. The company's set of broad capabilities span financial market data, wealth management workflow processing, and tech-enabled RIA services. Established by NewSpring Holdings in 2018, Finaceware combines the rich competencies and market leadership of its three businesses QUODD, VMS and Wealthcare and leverages go-to-market and operational synergies across the platform. Learn more at [www.finaceware.com](http://www.finaceware.com).

#### **About NewSpring Holdings**

NewSpring Holdings, NewSpring's dedicated holding company 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 \$2 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](http://www.newspringcapital.com).

#### **Media Contact:**

FiComm Partners

Caitlin Quain

[Caitlin.quain@ficommpartners.com](mailto:Caitlin.quain@ficommpartners.com)