



# Wealthcare Platform

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## Freedom to Focus on What Matters

After spending the beginning of his career in a commission-based, sales-driven role, Mo Young learned to discern the difference between perceived and real value. He had an epiphany — real value stems from what an advisor can do within the confines of having a deep knowledge of the client.

As Mo restructured his business to focus on fostering relationships with clients and adding value to their lives, he turned to Wealthcare in 2005. Turns out, his clients ended up loving it. Using Wealthcare's tools and processes gave relevance to Mo's client conversations that went beyond market returns and performance. After five years of using the platform, he joined the Wealthcare family as one of the company's original advisors. Twelve years later, Mo doesn't regret his decision for a minute. Wealthcare's core offerings have allowed Mo to add "radically" more value in the areas that matter most to his clients.

"Wealthcare positions the advisor to be truly valuable to their clients," said Mo. "The platform and suite of services allow me to be an advisor instead of a business manager. I can focus my time and energy on helping my clients manage their priorities and goals so they can live the lives they want. Wealthcare takes care of all the administrative responsibilities of running a business. Combined with their Comfort Zone® software that allows me to see within minutes how market changes and life events affect my clients, Wealthcare enables me to position myself at the center of my clients' financial lives."

## The Wealthcare Difference

Wealthcare allows a financial advisor to become the most important figure in their clients' financial lives. The firm does this in three ways.

First, Wealthcare takes care of the essential responsibilities of running a business, from accounting and marketing to trading, research, and compliance. Instead of acting as a business manager, advisors can focus on their clients.

Second, the Comfort Zone and 12 patents that go along with it give advisors the information they need to direct clients' financial energies to help them make the most out of their lives.

"The software shows me salient client data and within minutes I know how market changes could affect a client's life," said Mo. "The Wealthcare technology gives me the ability to direct my expertise and attention to the people who need it. I use the technology and data to determine if a client is funded, under-funded, or over-funded so I can help them adjust and continue to live their best lives."

Third, Wealthcare's GDX360 process empowers an advisor to position themselves at the epicenter of what clients value the most — the quality of their lives.

"Through both educating and coaching clients, the advisor aligns their capabilities with their goals according to their priorities so they can start from a great place," said Mo. "This is so much more than solving for 'X'. Capable advisors create better lives for clients through a web of tradeoffs that can only be done through a meaningful relationship. And GDX360, more than any process I have encountered, pre-positions the advisor to do this through a goals-based monitoring and adjustment process that never ends. The longer the process is used, the better for the client and the advisor."

Using Wealthcare's platform, Mo was able to focus on what he feels only an advisor can do — keep clients focused on what is controllable while giving them a process to manage uncertainty. This, coupled with the ability to outsource with Wealthcare, has allowed him to focus only on his clients' lives without concern of anything else.

## Foundation to Thrive

Since joining Wealthcare, Mo has quadrupled his funds under management. More importantly to Mo, he has been able to focus his time and attention on delivering personalized advisory services that make a significant difference to his clients' lives. His ability to fully immerse himself into his clients' financial plans and goals has led to meaningful results for them and their families, giving them reason to spread the word about Mo and his services.

His office is filled with postcards and pictures from clients excited to share the vacations they never thought they'd take, the educations they'd been able to provide for their children and grandchildren, the retirement parties hosted two years earlier than anticipated, and golden years with more annual income than originally predicted.

Mo runs his business on a referral only basis. When clients come to him, it's because their parents or grandparents have been with the firm for decades or because multiple people have recommended him.

Wealthcare has given him the support and platform to run his practice the way he wants. Mo concludes with a comment on how unique Wealthcare is,

*"If more people understood the truth about Wealthcare, the business would be a thousand times bigger than they are now... I don't think there's anywhere else I'd be better off."*