

# Aligning with Wealthcare

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## Integration that Benefits Clients

As seasoned portfolio managers with over 50 years of combined financial services experience, Jack Ditt and Bill McCollum knew they wanted to make a change. They also wanted to ensure they could continue growing and offering the best service possible to their clients while gaining the most value from the business they had built. Current market conditions, combined with a desire for eventual succession planning, encouraged them to monetize their Louisiana-based firm, Eagle Financial, and begin discussions with potential partners. They chose Wealthcare because access to modern resources would streamline practice management and expand their planning capabilities, elevating their client experience.

When he and Bill were evaluating the decision to partner with Wealthcare, Jack said: “We asked ourselves: Is this something that would be a good deal for our clients and what does Wealthcare bring to the table? The very quick answer to that is planning capabilities we’ve never had, automation, operational backing, people that help us with business functions like marketing, and an analytical team to help support investment management. I see all of that as a long-term benefit to our clients.”

## Growth from Streamlined Processes

Adopting Wealthcare’s platform, resources, and support teams brought efficiencies to Eagle Financial that gave Jack and Bill more capacity to engage in growth-oriented activities instead of the time-consuming administrative responsibilities of running a business. These added proficiencies have freed up more time for them to focus on business development and marketing opportunities that have led to substantial growth.

Within the first six months of their partnership with Wealthcare, their business has grown by 20%. They’ve leveraged Wealthcare’s offering to streamline their business and make the most of their independence and flexibility to increase their effectiveness in their local market and niche of independent oil and gas producers. Although they have historically operated as asset managers, Bill and Jack plan to continue their momentum throughout the year as they transition more of their clientbase into Wealthcare’s GD360® technology and Comfort Zone® tool, creating more planning opportunities.

“Several of our clients could really benefit from the Wealthcare way of planning,” Jack said. “We now have more free time to become well-versed with Wealthcare’s GD360 process and marketing our business.”

## A Relationship Built on Trust

When asked the main reason why an advisor would want to join Wealthcare, Jack feels it really comes down to trust. Despite the many PE and aggregator firms that were interested in buying Eagle Financial, he and Bill felt a strong comfort level with the team at Wealthcare that gave them confidence in their partnership and the direction their business was heading. According to Jack, the professionals he’s encountered and interacted with at Wealthcare have provided valuable support with the commitment and care that they would hope for in a partnership.

“There’s clearly a symbiosis here that’s going to benefit our business and clients in the long run,” said Jack. “When it comes to working with an advisor, clients are looking for someone who is competent and caring. Everything I’ve seen at Wealthcare fits that mold. I feel confident about the future.”

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Bill McCollum & Jack Ditt, Eagle Financial