



Growth with Supported Independence

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Cultural & Philosophical Alignment

Ayad Amary, MBA, CFP®, AIF® had a clear vision in mind when evaluating RIA partners for his independent financial planning practice. After spending 20 years working as an advisor for several large firms, he knew any relationship would need to share his belief that financial planning should support all aspects of a client's life. Wealthcare demonstrated cultural and philosophical alignment both in the initial recruitment meetings and throughout the 18 months that Ayad has been a part of the company.

"The leaders at Wealthcare spoke the same language in terms of financial planning being very intertwined with somebody's life, almost like life planning," Ayad said. "In conversations with some of the leadership team, I got a good sense that they were capable but also good people. That was very important to me."

A Collaborative Partnership with an Established Brand

In addition to shared values contributing to Ayad's decision to choose Wealthcare, the relationship structure also played an important role. He enjoys independent decision-making while still demonstrating to clients that he has the full support of a major financial firm. "Based on the clientele I was targeting, I didn't want to be entirely alone," explained Ayad. "Being associated with the Wealthcare brand shows security in my clients' minds."

Ayad also appreciates the revenue share arrangement. Despite interviewing 22 firms during his due diligence process, Ayad found that Wealthcare ultimately had the best cost structure for his needs. "I saw firms with higher payouts, but Wealthcare was fair in terms of the level of support they offer." The capabilities available with Wealthcare fit the needs of Ayad's clients and even enhanced his offering by allowing his practice to be more well-rounded. "I've never had to say to a client, 'We can't do this.'"



Cutting-Edge Technology with Built-in Support

GDX360® is Wealthcare's sophisticated financial planning software that makes it easier for advisors to spend time where it matters most. And for Ayad's practice, it's been a great fit, especially when combined with the operational support provided by Wealthcare. "I had a light bulb moment when calling with questions in the beginning," shared Ayad. "They told me not to be afraid to ask questions because they work for me. It was empowering and emboldening as I initially got used to a new arrangement as an entrepreneur." Because he experienced a smooth onboarding and integration process with Wealthcare, Ayad had the ability to hit the ground running when it came time to bringing his clients onto the organization's platform.

Wealthcare's leaders are also proactive in bringing new ideas to the table for affiliate partnerships and new wealth management vendors. Not every opportunity is always the right fit for Ayad's practice, but he knows the leadership team has fully vetted any service. And there's never any pressure; instead, Wealthcare empowers Ayad and other advisors to determine what products add value to their own businesses.

Time to Focus on What Really Matters

Partnering with Wealthcare has been a differentiating factor in Ayad's revenue growth, particularly over the last six months. "The biggest contributor is having the time to spend with my prospects," he shared. "I can attribute that to outsourcing most of my daily responsibilities. It's all on autopilot."

Wealthcare focuses on taking the non-revenue generating activities off the advisor's plate, allowing more time to focus on business development and nurturing client relationships. And that benefit doesn't just apply to advisors looking to grow their firms. Ayad pointed out that it's also crucial for those who want to simply maintain an existing client base, because it frees up time to ensure clients stay with your practice.

Ayad, concludes, "For prospective clients and clients, it's most important for them that I take the time not just to understand what they need, but to follow up with them and have meaningful conversations that aren't transactional. I have all the time we need if we're in a meeting or on a phone call. I think that's a big contributor to the success I've had."