WEALTHCARE
financial guidance for life

Wealthcare Affiliation Models

Your business. Your brand. Your future.

Thinking about a change? Are you considering launching an independent practice, joining an independent firm, or looking for additional support for your existing independent practice? We have options to consider.

Wealthcare offers a variety of flexible affiliation models so that you can run your practice and serve your clients the way you want. Partnering with Wealthcare can help you attain or elevate the independence you crave, with a flexible menu of support services, technology, and strategic partners you need. We also offer W2 options, allowing you to fully integrate into Wealthcare while maintaining your desired level of control.

Wealthcare offers back-office functions like compliance, operations, trading, marketing, investments, and billing support so you can focus on client and business development. We believe that true independence means unfettered flexibility, freedom of choice in products and services, as well as the potential to increase the value of your practice.

With Wealthcare, you also access industry experience and expertise. The Wealthcare team has managed over 100 transitions collectively, and the Board has over 135 years of combined experience. By taking advantage of the firm's client-centric solutions and experts, Wealthcare advisors grow at *3-4x the industry average.

Grow at
3-4x

The Wealthcare Experience

Whether you're thinking about going independent or are looking to improve your business model, Wealthcare offers flexible solutions to help advisors scale, create enterprise value and improve client experience.

Faster Growth

The Wealthcare approach has been shown to generate advisor growth at rates ***3-4 times the industry average.**

Improved Client Experience

Our model offers an elevated advisory experience that drives client loyalty, longevity, and referrals.

Cutting-Edge Technology

Wealthcare provides best-in-class technology solutions at each touch point in your work flow to build enterprise value and scale.

Business Continuity Plan

We help advisors establish long-term succession plans and realize the full value of the businesses they've work hard to build while supporting development in the next generation of advisors.

Practice Transformation

Our experienced team takes a personalized, consultative approach – whether you're just going independent, needs help transitioning to a fee-based model, or wants to optimize their operations.

Benefit from Size and Scale

Because of its size, Wealthcare offers elevated cybersecurity, compliance, and regulatory support with access to powerful custodians.

Wealthcare Affiliation Models

If you operate a hybrid practice or a fee-only model, we offer flexible affiliation models to fit your needs.

1099 Hybrid and Fee Only

Hybrid

Fee-Only

Benefits

Maintain your independence, brand, and ownership with our flexible options. We have affiliation options for hybrid and fee-only models, so you can continue to run your business the way you want.

W2 Sell or Maintain Your Practice

Retain Ownership

Sell Your Practice

Benefits

We also offer options for you to enjoy all the benefits of W2 employment, while either maintaining leadership responsibility for your business or fully integrating it into Wealthcare Advisors.

Which affiliation model is right for you?

Whether you're confident in your model or thinking about a structure change, consider your options and do your due diligence to make sure you make the right move. Ask yourself the following questions:

- **Is your current structure serving you and your clients?**
- **What's holding you back from reaching the next level of growth?**
- **What challenges are you trying to resolve?**
- **What do you want your next step to include?**
- **What would enable you to deliver the best service to your clients?**
- **Do you have a succession plan?**

Access Our Integrated Tech Stack

- CRM
- Financial Planning
- Portfolio Management
- Document Management
- Custodial Platforms
- Client Data Gathering
- Client File Sharing
- Client Portal Compliance
- E-Signature
- Investment Data/Analysis
- Performance Reporting
- Risk Tolerance
- Trading & Rebalancing
- Account Aggregation
- Communications Archiving

Integrate with Industry-Leading Partners

RetireOne · Healthpilot · REDTAIL · MODEL FA FINANCIAL ADVISING WITH A Heartbeat

OneTrust HOME LOANS · ENVESTNET Yodlee · trust&will · TIFIN AG

dpl financial partners · BIZEQUITY What's Your Business Worth? · COUNSEL TRUST · INCOMELAB

ORION · holistiplan · StoneCastle · Wealthbox

Pontera formerly FeeX · CIM · STEPSTONE inside private markets · TAG Tax Accounting Group Truly Distinctive • Positively Effective

Flexible Solutions.
Elevated Service.
Independence on Your Terms.

Wealthcare is a technology-enabled RIA that provides flexibility and service to advisors in its network, enabling them to focus on what matters most—their clients. By taking advantage of the firm's client-centric solutions and experts, Wealthcare's advisors grow at *3 – 4x the industry average.

With Wealthcare, you can embrace flexible affiliation and technology solutions, elevate your service offerings, plan for the future, and thrive as an independent advisor—all while achieving your goals and your clients' goals.

Contact us today to learn more about joining Wealthcare.

Telephone
(484) 232-5290

Email
salesteam@wealthcarecapital.com

Or visit our website to learn more
wealthcaregdx.com

*Advisor growth rate is based on the RIA Asset Growth Rates by Practice Size that is greater than $1B in CerulliU.S. RIA Marketplace 2020