PLANNING. INVESTMENTS. TOGETHER.

A goals-driven experience for today's inspired investor.

BE A PART OF THE EXPERIENCE

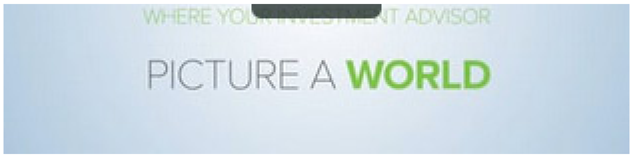
Disclosure

WEALTHCARE IS CHANGING THE INVESTMENT ADVISORY PARADIGM.

Goals-based wealth management is a popular theme these days. Seems like lots of firms are jumping on the bandwagon. But not every financial planning process is the same. So while most firms and advisors tout their abilities to help achieve clients' goals, in reality, they're usually stuck on yesterday's up-and-down, performance-focused roller coaster. They view money as a commodity to gain or lose — rather than a tool for pursuing real, tangible goals.

We know that goals-based wealth management isn't just a buzzword. It's a way of life — and we believe the entire financial community deserves a better way to help their clients pursue their goals and dreams. Explore how our patented goals-based wealth management process can transform your financial planning experience and guide you safely to your financial future.

DISCOVER THE WEALTHCARE DIFFERENCE



Goals-Based Investing

Overview of Wealthcare's Goals-Based Investing approach.

Future of Financial Advice in Light of the DOL Ruling

A conversation with industry icon Len Reinhart about the future of financial advice in light of the DOL ruling.

Why Wealthcare

Wealthcare advisors discuss how Wealthcare has affected their lives, and why Wealthcare is the right choice for them going forward.

The Wealthcare Effect

Wealthcare advisors pull back the curtain to explain how Wealthcare has changed their lives, their businesses, and the relationships they have with their clients.

Interview & Discovery

The first time a Wealthcare advisor talks with a client is more than a meeting to discuss finances. It is the start of a Goals-Based relationship that transcends the advisor-client experience for all parties involved.

Monitoring & Advice

Wealthcare advisors explain how the Wealthcare Planning process is about far more than just creating a financial plan.

DISCOVER OUR PROCESS

LEARN HOW WE INVEST

FIND AN ADVISOR

ACCESS ADVISOR TOOLS

THE DOL FIDUCIARY STANDARD

The proposed Fiduciary Rules represent a paradigm shift in the financial services industry. Wealthcare can help you navigate your transition into this new world and quickly position you to prosper in it.

We Offer a Turnkey Solution that Addresses the New Fiduciary Changes

Our consistent and repeatable process is focused on the best interests of the client by aligning their investments with their life goals and keeping them both in balance. We offer a suite of advisory and 401K solutions that fully comply with a fiduciary standard.

We encourage you to take stock of your exposure to the Fiduciary changes. Are you well positioned for the new standard? If not, we can help.

OUR PATENTED GOALS-BASED WEALTH MANAGEMENT PROCESS

The financial world is filled with uncertainty. But with Wealthcare as your guide, your future doesn't have to be. By combining personalized support and service with cutting-edge technology and tools, our elegant system helps investors answer the one question that matters most: Am I on track able to realize my life goals?

Wealthcare offers a patented goals-based wealth management process that helps investors confidently know where they stand at any point during their financial lives — and we built our approach on deep market knowledge and the power of science. From our patented goals matrix and 1000-lifetime probability analysis to our trademarked Comfort Zone™ indicator and beyond, we remove the guesswork from financial planning.

EXPLORE THE WEALTHCARE DIFFERENCE

THE CHOICE FOR GOALS-BASED WEALTH MANAGEMENT

Goals-based wealth management isn't something we do — it defines the very core of who we are. We first invented the software in 1999 and been continually researching and developing new ways to improve how well it works for you. Today,

12

Goals-Based Financial Process Patents

20YRS

Since We Pioneered Online Goals-Based Planning Software

Through its patented process, Wealthcare delivers an evidence-based planning process and portfolio implementation structure that keeps our clients – and what's most important to them – at the center of everything we do for them.

Russ Thornton, Wealthcare Advisor

LEARN MORE ABOUT US

ABOUT WEALTHCARE CAPITAL MANAGEMENT

Wealthcare Capital Management LLC is the creator of the original online goals-based planning software released more than 15 years ago and holds 12 patents on this innovative financial planning process. Driven by the belief that both advisors and investors deserve a better way to pursue their life dreams, we provide a full-suite of practice-management support services that empower advisors to establish a fulfilling career, while giving investors an objective, personalized client experience. Click here for important disclosures.

Click here for our ADV Part 2A.