



BECOME INDISPENSABLE TO YOUR CLIENTS BY PROVIDING ONGOING, LIFE-RELATIVE ADVICE.

MONITORING & ADVICE

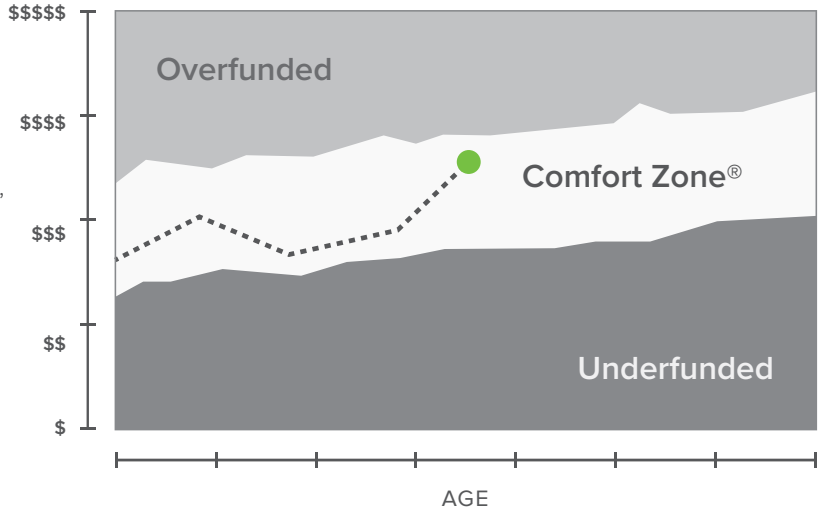
PLANNING VS. PLAN

CREATING A PLAN IS JUST A BEGINNING

You've had a great conversation with your client about their life goals. You've established a range for each goal, identifying their Ideal and Acceptable goals. You've established priorities and created a plan with the client's own Comfort Zone®.

Are you done? Not if you follow the Wealthcare process.

The Wealthcare plan is not a "set it and forget it" tool. It's a dynamic financial guidance system that evolves as your clients' circumstances and financial markets change. Here is your chance to shine as a trusted advisor who will keep your clients' goals on track.



CHANGING CIRCUMSTANCES

Your clients' lives are constantly changing. Did they get a promotion? Have a child? These types of changes are even more impactful than market movements and need to be reflected in their plans. To ensure your clients arrive at their desired financial destinations, you need to make small adjustments along the way.

CHANGING PRIORITIES

Not only do their life circumstances evolve, your clients' priorities may change as well. What may have been monumentally important just a couple of years ago, may not be as significant today. This is why ongoing conversations with your clients are critical to your success as their trusted advisor.