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## Wealthcare Launches New Flagship Website, [www.wealthcareGDX.com](http://www.wealthcareGDX.com)

*Website highlights firm's evolution from software focus to a complete, experience-based, goals-driven advisor business model.*

RICHMOND, VA. (April 17, 2019) – Wealthcare, a wealth management innovation company, today announced that it has launched a new website, [www.wealthcareGDX.com](http://www.wealthcareGDX.com). The new website showcases how the firm's brand has evolved from a financial planning software focus to a complete goals-driven experience (GDX) for advisors and investors. In 2018, as a first step in elevating the Wealthcare brand, our well-known financial planning technology was renamed GDX360®, and made available at: [www.GDX360.com](http://www.GDX360.com).

Wealthcare differentiates goals-driven experiences with its advisor-focused GDX360 platform. This approach unites the two pivotal parts of goals-driven advice - planning and investing – in one connected experience that gives advisors new ways to see, manage and grow their business. Powering Wealthcare's goals-driven experience is the firm's patented Comfort Zone® approach that can give investors confidence in the likelihood of exceeding their goals.

“Since 1999, when the company was launched, Wealthcare has been a leading goals-based planning brand” said Matt Regan, President of Wealthcare. “The industry has changed, driven by advisor and investor demand, and based on our twenty years of experience, we’ve elevated our approach. Supporting this, we’ve rebranded our planning technology as GDX360, as this reflects the platform’s enhanced position as a complete advisory business model. GDX360 combines goals-based planning and investing with household-level portfolio management and smart tax optimization driven by asset location and other tax strategies, in one, unified platform that gives advisors more time, while improving the advisor-client wealth experience.”

“When we looked forward to the next phase of our firm’s growth, we sought a partner with a complete platform that would allow us to deliver a personalized wealth experience to clients,” said David Petoskey, RFC, President of Wealthcare Management Services, a firm affiliated with Wealthcare Advisory Partners LLC. “Wealthcare’s GDX360 fit that requirement as it brings together planning and investing to create one connected, customized experience for our clients. Just as important, Wealthcare’s new GDX messaging and branding helps us to tell the story to clients in a meaningful way.”

The new [wealthcareGDX.com](http://www.wealthcareGDX.com) website will feature content across three primary audiences: investment firms, financial advisors and investors. It describes the many ways in which firms and advisors can partner with, or join Wealthcare. “PlanIt”, Wealthcare’s new web-based tool, accessible via <https://planit.gdx360.com>, introduces investors to the firm’s Comfort Zone concept.

## **About Wealthcare**

Wealthcare, a business unit of Financeware, architected its original goals-based planning and investing methodology more than 18 years ago and holds 12 patents on this established goals management process. Powered by its patented Comfort Zone, Wealthcare's approach features innovative, personalized experiences and step-by-step tools that create deeper relationships between advisors and investors. Wealthcare empowers firms and advisors to grow their advisory businesses by providing GDX360 – Wealthcare's proven fiduciary process that seamlessly integrates planning, investing and trading – and a full-suite of practice-management services. Wealthcare Advisory Partners LLC is the firm's Hybrid RIA, which was created in 2014. Wealthcare is a Financeware portfolio company with over \$2 billion in AUM across both RIAs, and serving more than 70 affiliated advisors. Learn more at [www.wealthcarecapital.com](http://www.wealthcarecapital.com).

## **About Financeware**

Financeware is the industry's leading fintech platform company focused on driving strategic growth and expansion of innovative companies across the new wealth management space. Established by NewSpring Holdings in 2018, Financeware was born of a need to connect winning solution sets to the fast-moving targets, partners and market relationships playing out across the entire wealth management sector. With a deep history of game-changing wins driven by broad and deep market leadership, the group drives strategic growth of portfolio companies focused in key areas of wealth management, financial advisory, and data management. Financeware's growing portfolio includes Wealthcare, VMS and QUODD. Learn more at [www.financeware.com](http://www.financeware.com).

## **About NewSpring Holdings**

NewSpring Holdings, the dedicated, diversified holding company within NewSpring, with a strategy focused on control buyouts and platform builds, brings a wealth of knowledge, experience, and resources to take profitable, growing companies to the next level through acquisitions and proven organic methodologies. Founded in 1999, NewSpring partners with the innovators, makers, and operators of high-performing companies in dynamic industries to catalyze new growth and seize compelling opportunities. The Firm manages approximately \$1.7 billion across four distinct strategies covering the spectrum from growth equity and control buyouts to mezzanine debt. Partnering with management teams to help develop their businesses into market leaders, NewSpring identifies opportunities and builds relationships using its network of industry leaders and influencers across a wide array of operational areas and industries. Visit NewSpring at [www.newspringcapital.com](http://www.newspringcapital.com).

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