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Wealth Management Services Announces Partnership with Wealthcare, Rebrands as Wealthcare Management Services

Michigan-based Wealth Management Firm Integrates Wealthcare's Goals-Driven Planning and Investing Approach and Technology

BLOOMFIELD HILLS, MI (November 19, 2018) – Wealth Management Services, a planning and investment firm in Greater Detroit, today announced it has partnered with wealth management innovation company Wealthcare to enhance delivery of its goals-driven approach to clients. As a result of the partnership, the firm will rebrand to Wealthcare Management Services (WMS).

WMS will adopt Wealthcare's GDX360® platform, which aligns clients' life goals with personalized investment strategies. The platform unites planning and investing to create one connected, customized experience for advisory firms and their clients. WMS will also benefit from Wealthcare's full suite of practice management support services.

"As we looked forward to the next phase of our firm's growth, we sought a partner that would allow us to deliver the personalized service that our clients have come to expect while providing the depth of services and resources typically found in large investment firms," said David Petoskey, RFC, President of Wealthcare Management Services. "As part of this effort, it was important for us to bring our core values to the forefront. Clients will now see 'We Care' right in our new name – **We**alth**care** Management Services."

WMS clients will be introduced to Wealthcare's patented Comfort Zone® approach, which visually maps a client's goals and provides a clear, relevant picture of how they are positioned to address those goals. Comfort Zone acts as a dynamic guidance system designed with the goal to ensure clients stay on track as circumstances change and markets shift.

"For more than two decades, Dave has been providing his clients with impressive personal service and smart investment plans," said Matt Regan, President of Wealthcare. "We are pleased to partner with Dave to take his practice to the next level with our goals-driven platform and approach. It's especially exciting given Wealthcare's recent growth in the region. We look forward to expanding our presence and partnerships in Greater Detroit."

About Wealthcare Management Services

Wealthcare Management Services began serving clients in the Greater Detroit area in 1995, and provides clients with a goals-driven experience that synchronizes planning and investing. The WMS team recruits financial advisors, and also works with a wide range of clients, including business owners, executives, entrepreneurs, and families in the Detroit metropolitan area and beyond. WMS also developed a CPA Alliance program to network with CPAs to bring value-added services to their accounting practices. The firm's core values, which guide each client relationship, are: (1) We Care. We Strive to Protect and Do the Right Thing, (2) We Treat Our Clients and Each Other Like Family, (3) Integrity: Open, Honest, Transparent, and (4) Committed: We Finish What We Start. Learn more at www.wealthcarewms.com.

About Wealthcare

Wealthcare Capital Management LLC 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 its two affiliated RIAs, and serves more than 70 affiliated advisors. Learn more at www.wealthcarecapital.com.