

THE WEALTHCARE MOVEMENT TAKES HOLD

By David B. Loeper, CIMA®, CIMC®

"There can be no transforming of darkness into light and of apathy into movement without emotion." - Carl Jung

Last month a dozen financial industry leaders, representing tens of thousands of investors and tens of billions in assets, met at our Advisory Board retreat. For the first two hours of the meeting, as these professionals described their practices and role in financial advising, we heard deeply emotional stories about how Wealthcare is changing people's lives. There was a story of a physician that was able to retire and is living his dream of learning to fly and now owns his dream plane, because an advisor applied Wealthcare in its purest form with integrity. There was a story of a middle class couple in their late 50's that, despite the markets of 2008, became misty eyed when they found out the wife could retire earlier than they had planned to spend more time with her mother and grandchildren. These stories continued throughout the day even as we discussed other matters on the agenda; each of them describing touching and heartfelt ways advisors applied Wealthcare to meaningfully improve people's lives.

Beyond helping clients, I think what really struck all of us was the genuine appreciation and gratitude these clients expressed to their advisors and the impact that had on the advisors. These advisors made it possible for these clients to make the most of their lives...to really live their dreams and the value of that appreciation cannot be measured in mere economic terms. The personal satisfaction these advisors expressed in their careers, the intellectual naked honesty they could practice in their day to day interactions with clients, and the pride they felt after making deeply personal and emotional connections with their clients to make a meaningful difference in their lives was **described as a higher calling**. Despite the endless benefits to their business, the significant growth in assets, massive improvements in efficiency and the advisor's own lifestyle, expanding revenues while reducing client expenses, all of these business benefits of Wealthcare paled in contrast to the pride and deeply emotional satisfaction of truly helping people make the most of their lives.

These men and woman are rare visionaries and few in the industry really have what it takes to truly focus on what matters...*to make themselves valuable again* instead of their value being based on a product, a tool, or a report. But rest assured, they have heard the calling and are committed to one day changing our industry through this Wealthcare movement to make what they experience each day the norm rather than the exception. We are committed to helping them. Are you?



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As these leaders begin on their mission, you will start to hear more about it. One example is a story about Mowry Young, an Advisory Board member who was featured in an article in *Advisor Perspectives*, [Building a Practice in America's Fastest Dying City](#). Read this brief article and the others that will follow in coming weeks and consider whether you too might hear the higher calling of this movement to make the most of both your clients' lives and your own.

The Wealthcare Movement - This is the future of financial advising.

A popular industry speaker and writer, DAVID B. LOEPER is the CEO and founder of Financeware, Inc. in Richmond, VA. He is author of the top selling book [Stop the 401\(k\) Rip-off!](#), three other books being released in 2009 by John Wiley & Sons ([Stop the Retirement Rip-off](#), [Stop the Investing Rip-off](#) and [The Four Pillars of Retirement Plans](#)) and numerous whitepapers. He has appeared on CNBC and Bloomberg TV, served on the Investment Advisory Committee of the \$30 billion Virginia Retirement System, and was chairman of the Advisory Council for the Investment Management Consultants Association (IMCA). Before founding Financeware in 1999 he was Managing Director of Strategic Planning for Wheat First Union. He earned the CIMA® designation (Certified Investment Management Analyst) from Wharton Business School in 1990 in conjunction with IMCA.

WEALTHCARE RESOURCES

New Books Available on [Amazon](#) and [Barnes & Noble](#), and [Borders!](#)
[Stop the Retirement Rip-Off](#)
[Stop the Investing Rip-Off](#)
[The Four Pillars of Retirement Plans](#)

No Time to Read Loeper's Books? Sign up for our free webinars!
David Loeper will be hosting three 30 minute webinars in September; each one covering the key information from each of his books released this year. To sign up, click on the links below, or e-mail support@wealthcarecapital.com.

[Stop the Investing Rip-Off Webinar](#) – Sept. 22 at 4:15 ET
[The Four Pillars of Retirement Plans Webinar](#) – Sept. 29 at 4:15 ET
[Stop the Retirement Rip-Off Webinar](#) – Oct. 6 at 4:15 ET

[Measuring Temperature with a Ruler](#)

A recorded version of one of our most popular educational email series on wealth management is now available online [here](#). The original whitepaper can be found [here](#).

[Updated Value Proposition Power Point Available](#)

We've updated the look and feel of our popular Wealthcare value proposition presentation for clients. Click [here](#) to open it.