



## WEALTHNETIC™ – ADA, MI



### Member Overview

For over 20 years, Wealthnetic™ has been providing turnkey financial marketing and business building solutions for financial advisors across the country. Focusing on three achievements, Wealthnetic helps advisors by first – communicating with prospects, secondly – managing each client's investable and insurance assets, and lastly – growing their practice through the use of compliant tools and trust.

Wealthnetic understands the complex nature of the financial industry and is a tightly knit organization with an experienced staff dedicated to finding innovative solutions.

### Member Value Proposition

Wealthnetic offers a high production platform for the marketing and financial planning needs of quality advisors, asset gatherers, and wealth managers. As a member of Peloton, Wealthnetic will continue to offer effective strategies and share resources to promote growth and new ideas for members and clients across the country.

### A Wonderland For Advisors

When partnered with Wealthnetic professionals are presented with the best wealth management strategies and tools available within the industry. Offering a "Wonderland for Advisors," Wealthnetic unifies all the crucial regulatory corporate elements under one roof with four important components for partnering with advisors.

### Member Leadership

- » Mike Walters, Chairman, CEO – [mwalters@wealthnetic.com](mailto:mwalters@wealthnetic.com)
- » Brent Enders, President – [benders@wealthnetic.com](mailto:benders@wealthnetic.com)

These components include:

- » **USA Financial Securities**<sup>®</sup> – is an independent broker dealer and SEC Registered Investment Advisor providing independent registered reps and investment advisor reps with innovative investment management technology platforms and tools.
- » **AnnuAssure Distribution**<sup>®</sup> – is an independent insurance marketing organization and field marketing organization that builds business across all carriers and product lines, offering a full array of Annuity, Life and LTC advanced sales support.
- » **Portformulas**<sup>®</sup> – is an SEC Registered Investment Advisor firm that provides turnkey asset management services to independent registered reps, investment advisors, and stand alone Registered Investment Advisors using Formulaic Investing™ strategies. Also, a patent pending feature called RAM which monitors leading economic and market indicators to help determine client asset allocation.
- » **Plug-N-Run**<sup>®</sup> – represents a collection of proven successful compliant marketing and technology solutions with coaching and consulting for advisor advancement.

Wealthnetic helps shape a dynamic business model for the betterment of each advisor's overall practice through offering services such as business development and case design, coaching and consulting, strategic planning and corporate advancement. By maintaining unparalleled relationships and solving pressing issues through these four components, their advisors have a competitive advantage allowing them to surpass the most difficult hurdles.

### Member Contact Information

#### Wealthnetic

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