INCOMECONDUCTOR

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IncomeConductor® and Adhesion Wealth Advisor Solutions: A Perfect Retirement Income Partnership

Hartford, CT – August 28, 2017 – WealthConductor LLC ("WC") is pleased to announce its partnership with Adhesion Wealth Advisor Solutions ("Adhesion") in offering a complete retirement income solution for financial advisors. WC's revolutionary Software as a Service (SaaS) technology and platform of advisor services, IncomeConductor®, supports financial advisors in creating, tracking and managing customized plans for their clients using a time-segmented strategy. Adhesion's UMA Platform then removes the complexity of implementing the strategy, with all segment portfolios managed in a single custodial account.

With $750 Billion in retirement assets in motion, and 10,000 Baby Boomers retiring each day, there is an increasing demand from clients for retirement income planning services, and advisors are looking for a scalable solution to meet these demands cost-effectively. IncomeConductor® is an innovative, comprehensive, scalable program that includes a full suite of advisor support: live and on-demand training on the time-segmented retirement income strategy, sales and marketing support, case consultation, and an intuitive technology platform that helps the advisor manage the *entire* lifecycle of a retirement income plan, including providing the ability to make 'course corrections' to the plan along the way.

Adhesion's powerful UMA platform is an ideal solution for implementing clients' IncomeConductor® plans. With Adhesion, the assets funding multiple segments of a plan can sit in a single custodial account, each as a UMA 'sleeve', eliminating the redundant custodial fees for clients that comes with opening an account for each portfolio. Advisors gain this simplicity while still maintaining control over the portfolio selection – leveraging the hundreds of investment managers and strategists available through the Adhesion platform.

"IncomeConductor® was developed as the next generation of retirement income planning for advisors who want to go beyond the typical "proposal" software and, instead, implement a full-cycle solution that includes intuitive management and modification capabilities," Sheryl O'Connor, CEO of WealthConductor LLC, said. "*Our time-segmented strategy allows advisors to create plans customized for each client's needs and goals, while addressing their clients' preference for dealing with smaller, simplified issues which can assist both advisors and their clients in successfully weathering periods of high market volatility. Up until now, implementing time-segmented plans could involve opening multiple like-registered accounts. Using Adhesion's UMA Platform and its direct connection into IncomeConductor, advisors find implementing and managing the plan very easy.*"

"*We are finding an increasing number of advisors in search of a solution to help create and implement retirement income plans for their boomer clients*," stated Michael Stier, president and CEO of Adhesion. "*Most advisors are comfortable with creating portfolios for clients in an accumulation phase, but there is often a real gap with how to support clients approaching or in retirement. They are finding traditional financial planning software is just too complex, and it doesn't help implement the plan. IncomeConductor® is a great solution that hits the bullseye by specializing on the most significant* *financial planning challenge advisors face today. We are thrilled to partner with WC to deliver a true retirement income solution to advisors*."

For media inquiries, please contact Tom O'Connor, 860-969-3671, toconnor@wealthconductor.com

About WealthConductor LLC.

WealthConductor LLC ("WC") was founded in 2017 by advisors experienced in the retirement marketplace. We understand the challenges financial professionals face and what they need to succeed. WC's revolutionary retirement income platform, IncomeConductor®, provides a complete suite of support to financial advisors who want to re-define their value proposition as retirement income professionals and provide a time-tested income distribution strategy to their clients that is completely customized to their individual needs and goals. We partner with our IncomeConductor community of advisors to continuously enhance our technology and supporting program to help them succeed in the income distribution market. Your success is our success.

www.incomeconductor.com

About Adhesion Wealth Advisor Solutions.

Founded in 1999, Adhesion Wealth Advisor Solutions is a $13 billion Unified Managed Account Platform focused on developing and delivering innovative managed account solutions to investment advisors who desire to bring their clients - and their practices - to the next level.

www.adhesionwealth.com