



IncomeConductor Announces Launch of *Health+* and Integration of HealthView Services Data

IncomeConductor utilizes HealthView healthcare cost data to enhance retirement planning services

HARTFORD, Conn., April 19, 2022 – WealthConductor LLC, a fintech firm that provides enterprise and financial advisor clients with the interactive retirement income planning software, IncomeConductor, today announced the launch of a new product, Health+. Through the integration of HealthView Services data, advisors will have the ability to automatically incorporate personalized actuarial longevity projections, Social Security claiming options and healthcare expense projections, including both Medicare premiums and out-of-pocket costs, into their client plans.

IncomeConductor's *Dynamic Plan Editor*[™] already allows advisors to create customized, written income plans alongside their clients who can see the impact of various assumptions on their plans in real time. By incorporating institutional health, Social Security and longevity data from HealthView Services, advisors and clients will be able to clearly see how the clients' individual health situation and related expenses impact their overall plan and assist them in choosing a Social Security claiming strategy that seeks to achieve the best income scenario.

“We are excited to incorporate HealthView data to deliver the kind and quality of information advisors and clients need to make informed financial decisions in retirement,” said Sheryl O'Connor, CEO and Co-founder of WealthConductor LLC. “Healthcare expenses and not outliving one's savings are consistently two of the top concerns retirees have. Oftentimes, advisors and clients must base decisions on ‘best guesses’ or go by outdated rules of thumb and may even avoid the uncomfortable conversation about the client's longevity and health altogether. Having reliable data and instantly seeing the

relational impacts of assumptions based on these data with IncomeConductor will undoubtedly lead to more reliable income plans.”

“By incorporating HealthView data, WealthConductor’s innovative new Health+ application helps advisors using IncomeConductor to integrate projected healthcare expenses into retirement plans,” said Ron Mastrogiovanni, Sr., Chairman and CEO of HealthView Services. “Leveraging personalized, actuarial data is a critical step in providing the peace of mind that healthcare costs will be covered during the retirement planning process.”

About IncomeConductor

IncomeConductor is the flagship platform of WealthConductor LLC, founded in 2017 by a team of financial professionals with over 65 years of combined experience. It is an intuitive software and strategy that allows advisors and clients to truly collaborate to achieve a successful retirement performance. The platform breaks income plans into time-segmented milestones, each segment can be aligned with specific income goals. With IncomeConductor, advisors can easily link and sync data from any source in real-time, providing daily plan performance, analytics, business intelligence, one-click client review reports and insight alerts that help advisors protect their clients’ income throughout retirement. For more information, please visit <https://incomeconductor.com/>

About HealthView Services

Founded by a team of financial professionals, healthcare industry executives, and physicians, HealthView Services is a leading provider of healthcare cost-projection software and related tools. Its portfolio of retirement planning applications is utilized by advisors, financial institutions, employees, and consumers across the country. With more than a decade of use across the financial services industry, these solutions have proven to be a powerful driver of savings and retirement planning. The firm has developed several software applications that address healthcare cost projections, long-term care costs, Medicare premiums and surcharges, Social Security optimization, and other retirement-planning factors. For more information, please visit hvsfinancial.com.

Media Contact:

Tom O’Connor, CMO & Founder 860-969-3671 toconnor@wealthconductor.com