

# **WEALTHCARE**

INVESTMENTS & INSURANCE



[www.wealthcareinvest.com](http://www.wealthcareinvest.com)

**SPENDING • SAVING • INVESTING**  
**GROWING YOUR MONEY**  
*Building Strong Relationships*



## OUR MISSION

- Empowering families to create the financial destiny they desire by revolutionizing the way they spend, save, invest, and grow their money.
- Building and maintaining strong relationships with our clients in order to provide lasting value to them and their families.

## OUR INVESTMENT PHILOSOPHY

- In terms of functionality, we believe there are no bad investment products and services; however, there is bad investment advice.
- Every investment has a purpose. The key is choosing the correct investments that are in line with your investment objectives, matches your risk comfort level, and is suitable for your current financial situation.
- We always act in your best interest.

## OUR FIRM

WealthCare Investments & Insurance was founded by Mark Mercurio in 2011. The firm grew out of Employee Benefits Services, LLC, founded in 2002.

- Offering a full range of financial and investment products and services.
- Applying new concepts to traditional methods of investing.
- Providing a comprehensive approach to financial planning.





## MARK A. MERCURIO

- Registered Representative with American Equity Investment Corporation
- Owner/President WealthCare Investments & Insurance, LLC and Employee Benefits Service, Corp.
- Co-Founder/Owner Rogue Financial
- Securities Licensed Series 6 & 63
- Life, Health, Property & Casualty Licensed
- Experience in the financial and insurance industry since 2002
- Notary Public
- Email Mark @ [mmercurio@investforyou.com](mailto:mmercurio@investforyou.com)



## R. SCOTT WALKER

- Investment Advisor Representative, American Capital Management
- Life & Health Insurance Licensed in KY & IN
- Series 65 Securities Licensed
- Master of Arts, University of Louisville
- Notary Public
- Experience in the financial and insurance industry since 2005
- Email Scott at [scott@amercap.com](mailto:scott@amercap.com)

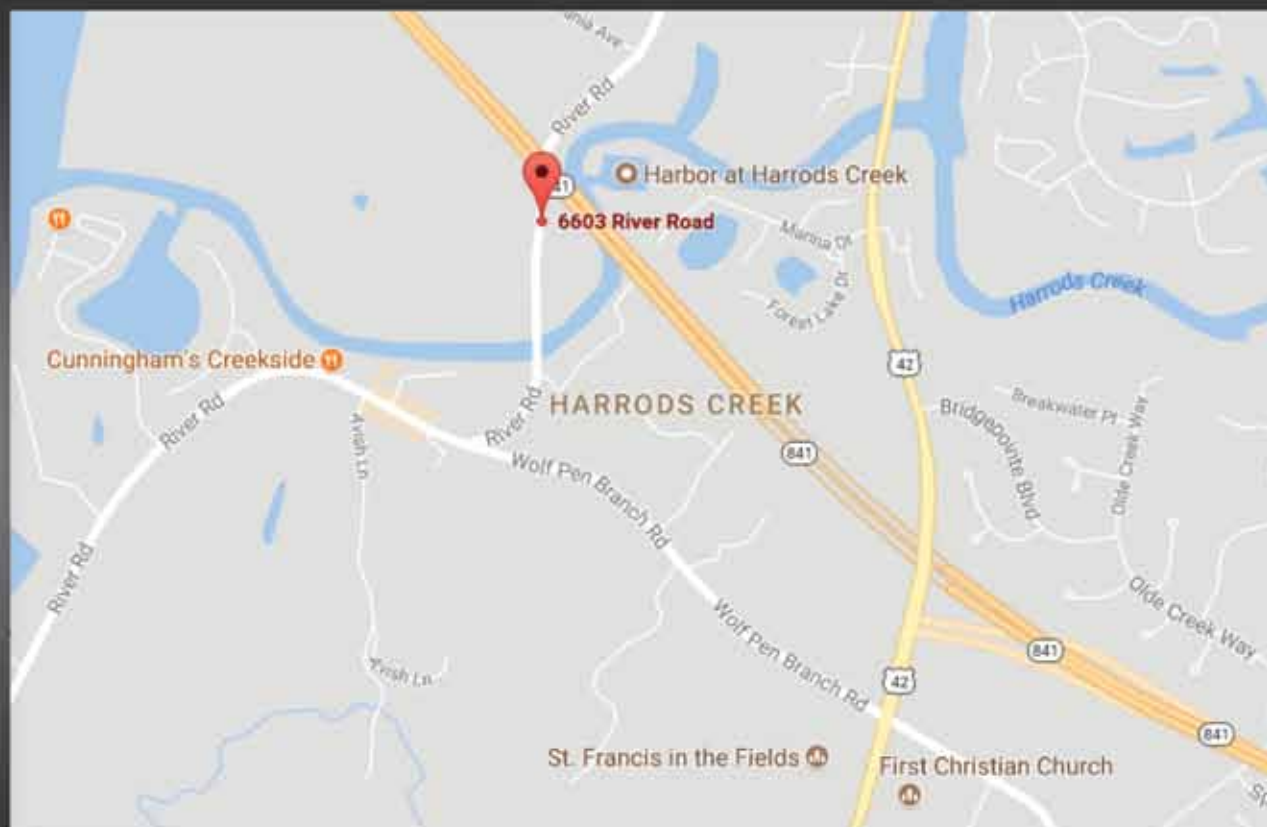


## JON C. DAVIDSON

- Life & Health Insurance Licensed in KY & IN
- Life, Disability, Long-Term Care & Supplemental Health Insurance
- Indiana University
- Experience in the financial and insurance industry since 1992
- Email Jon at [jon@thebestsavingsplan.com](mailto:jon@thebestsavingsplan.com)

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Our office is located at 6603 River Road next to the I-265/841 overpass at the East End Bridge. From Hwy 42, turn onto Wolf Pen Branch Road at the traffic light. Go to the first stop sign and make a sharp right turn onto River Road. After crossing over Harrods Creek on River Road, our office will be the third entrance on the right just before the I-265/841 overpass.

6603 River Road, Prospect, KY 40059  
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[www.wealthcareinvest.com](http://www.wealthcareinvest.com)

Securities offered through American Equity Investment Corporation, AEIC,  
Advisor services offered through American Capital Management,  
Member FINRA & SIPC. Check the background of this investment professional on <https://brokercheck.finra.org>  
4222 Grant Line Rd. New Albany, IN 47150.

All other products & services offered through WealthCare Investments & Insurance.

