

Building Your Investment Strategy Using Riskalyze



Riskalyze is cutting edge technology that identifies your acceptable levels of risk and reward with unparalleled accuracy. Using this tool, we ensure that your portfolio aligns with your investment goals and expectations.

With Riskalyze We Can:

- Capture Your Risk Number
- Align Your Portfolio
- Meet Your Retirement Goals

Together we can take the guesswork out of your financial future.

YOUR LOGO HERE

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YOUR RISK NUMBER IS



CURRENT PORTFOLIO



ALIGNED PORTFOLIO



STRESS TEST

2013-Like Bull Market

The estimated performance is the likely result if this portfolio had been invested from January 1, 2013 to December 31, 2013. During that time frame, the S&P 500 gained 32%

14.4%
ESTIMATED PERFORMANCE
JAN 1, 2013 TO DEC 31, 2013.

Calendar Year 2008

The estimated performance is the likely result if this portfolio had been invested from January 1, 2008 to December 31, 2008. During that time frame, the S&P 500 dropped 38%

-15.8%
ESTIMATED PERFORMANCE
JAN 1, 2008 TO DEC 31, 2008.

Financial Crisis Redux

The estimated performance is the likely result if this portfolio had been invested from October 15, 2007 to March 2, 2009. During that time frame, the S&P 500 dropped 53%

-22.3%
ESTIMATED PERFORMANCE
OCT 15, 2007 TO MAR 2, 2009.

1. Capturing Your Risk Number

The first step is to answer a 5-minute questionnaire that covers topics such as portfolio size, top financial goals, and what you're willing to risk for potential gains. Then we'll pinpoint your exact Risk Number to guide our decision-making process.

Review Your Current Investments

It turns out 4 out of 5 people have more risk in their portfolios than they previously realized. Riskalyze technology empowers us to make sure the Risk Number of your portfolio matches your personal Risk Number.

2. Aligning Your Portfolio

After pinpointing your Risk Number, we'll craft a portfolio that aligns with your personal preferences and priorities, allowing you to feel comfortable with your expected outcomes. The resulting proposed portfolio will include projections for the potential gains and losses we should expect over time.

Stress Test Investments

Stress tests illustrate how your proposed portfolio would have fared through various market events over the past 8 years, including the financial crisis and recovery.

Review Risk & Reward Potential

We can visualize the risk and reward profile for each individual investment we propose for your portfolio. Illustrating risk, reward and diversified risk gives us a powerful tool to review before we make any final investment decisions.

RISK & REWARD REVIEW



3. Meeting Your Retirement Goals

We will also review your progress toward your financial goals by building a Retirement Map.



When we are finished, you'll fully understand what we can do to increase the probability of success.

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