

Building Your Investment Strategy Using Riskalyze

Riskalyze is award-winning technology that quantifies your acceptable levels of risk and reward. Using this tool, we help ensure that your portfolio defines your investment goals and expectations.

TOGETHER WE CAN WORK TO TAKE THE GUESSWORK OUT OF YOUR FINANCIAL FUTURE.



Powered By
riskalyze

Let's get started.

RISK
42



DEFINE YOUR RISK NUMBER

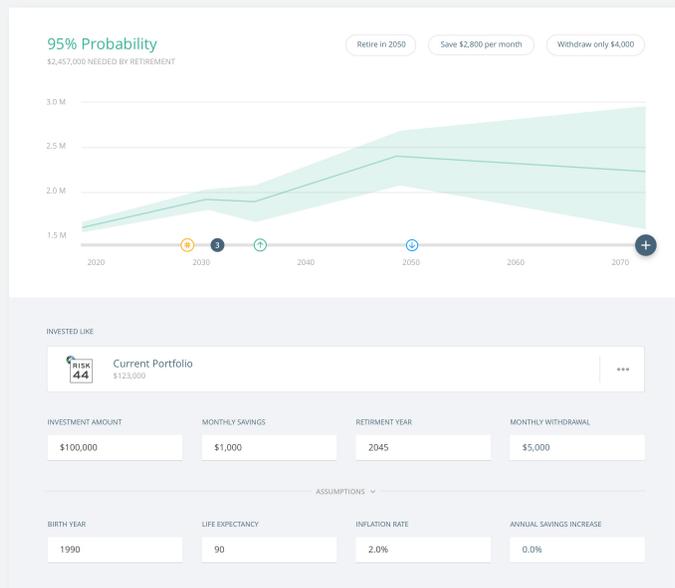
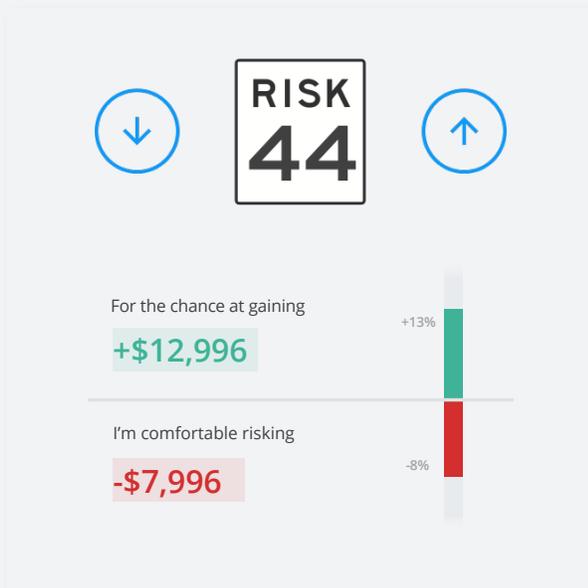
The first step is to answer a 5-minute questionnaire that covers topics such as portfolio size, top financial goals, and what you're willing to risk for potential gains. Then we'll pinpoint your Risk Number to help guide our decision making process.

ALIGN YOUR PORTFOLIO

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

DEFINE YOUR RETIREMENT GOALS

We will also review your progress toward your financial goals by building a Retirement Map. When we are finished, you'll better understand what we can do to help increase the probability of success.



Screenshots: Risk Number® and sample six-month 95% Probability Range and a sample Retirement Map

Disclosure: All investing involves risk, including possible loss of principal. No investment strategy can guarantee a profit or protect against loss. Securities offered through "Insert BD Name".