

INSERT YOUR
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Crafting Your Investment Strategy with Riskalyze

PREPARED FOR (CLIENT NAME)



Delete the template block above and replace with your firm's compliance approved logo. **If you choose to make edits beyond the addition of your approved logo please submit for approval prior to use.**

Feel free to use our title or create your own! Tailoring each presentation with a client's name(s) provides a nice touch.



Let's talk about Risk.

Subjective risk questionnaires nearly always miss the mark.



"We're going to start our conversation today by talking about risk. You may or may not be familiar with the older approaches to assessing investment risk that have dominated the industry for decades, but let me walk you through the approach I use in my practice..."

“AGGRESSIVE”



“MODERATE”



“CONSERVATIVE”



That’s because the old way of assessing risk, stereotyping investors with subjective semantics, simply doesn’t work.



“The old way of assessing risk, stereotyping investors with subjective semantics, simply doesn’t work. The words “moderately conservative investing” may mean something different to you than it does to me, and a person’s age doesn’t always determine those factors anyway. In fact, a team of academics performed an assessed our methodology and found that 52% of 20-29 year olds aren’t *aggressive*, and 53% of 70-79 year olds aren’t *conservative!*”

“I like to treat my clients as individuals...”



My approach uses the Risk Number. It's built upon a Nobel Prize-winning framework, and everyone has one.
What's yours?



“That’s why my approach utilizes something called the “Risk Number.” It’s a quantitative way to pinpoint how much risk you want, how much risk you currently have in your portfolio, and how much risk you need to take to reach your goals.”

“It’s a number from 1 to 99 (1 is like having cash under your mattress, 99 is like having all of your retirement investments in an aggressive stock).”

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My Process

I combine my depth of investment knowledge,
investment philosophy, and cutting-edge technology
in order to empower fearless investing.



Note another placeholder for your own brand. This is also a great spot for your own investment philosophy, mission, or firm-based messaging.

“Now, let me show you what this looks like...”

NOTE: If you choose to use your own investment philosophy please submit for compliance approval prior to use.

How much risk do you want?

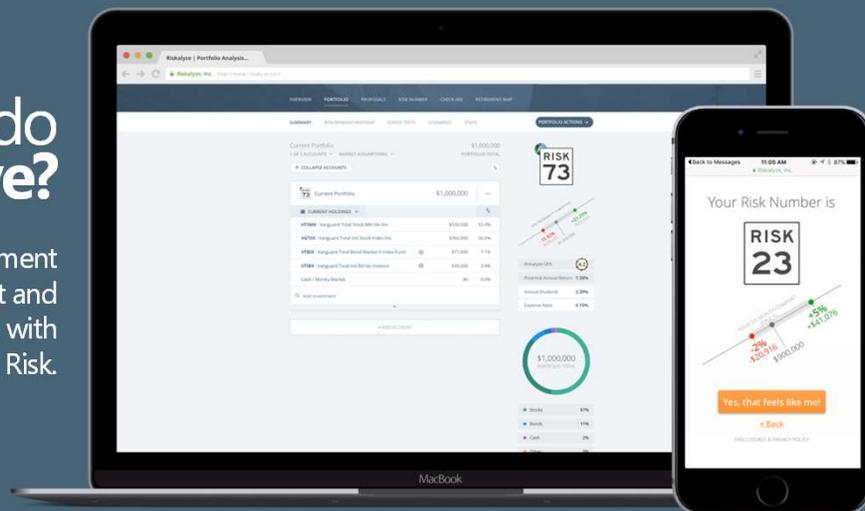
We'll take a quantitative approach to pinpointing your Risk Number by going through a series of objective exercises based on actual dollar amounts.



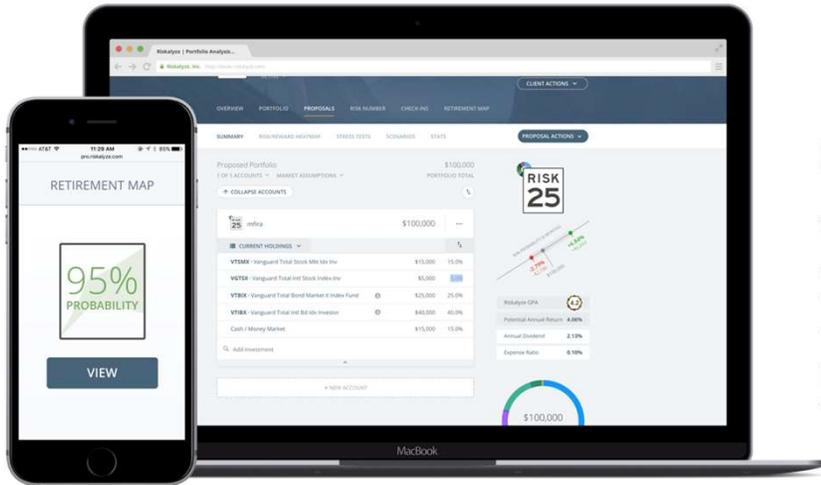
“Let’s pinpoint your Risk Number. We’ll go through a series of simple, mathematical assessments based on real dollars to determine how much you’re willing to risk (lose) in exchange for an opportunity at a specific gain. This puts you in charge of an objective outcome. If you’d like to go back, change the results, or use a more detailed version of the assessment, we can do that easily.”

How much risk do you have?

If you've already got an investment portfolio, we can quickly import it and see if your Risk Number aligns with your current amount of Risk.



“If you’ve already got an investment portfolio, there are a few ways we can quickly and securely import it to see if your Risk Number aligns with your current amount of Risk.”

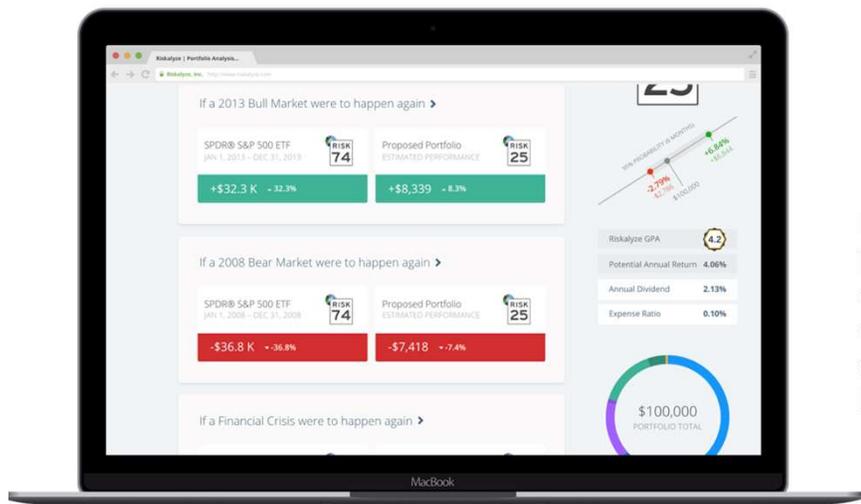


How much risk **should** you have?

We'll use all these factors to build an optimized portfolio that fits your risk tolerance and goals. We can then stress test your new portfolio, discuss your 95% probability range, and set expectations for the future!



“I’ll take all these factors into consideration to build you an optimized portfolio that fits your risk tolerance and goals. We can then stress test your new portfolio, visualize expense ratios, discuss your 95% probability range, and set expectations for the future!”

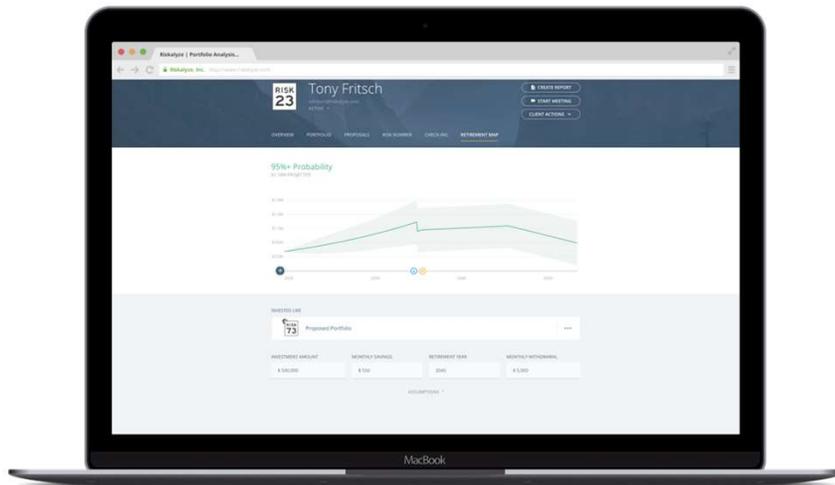


But, what if...

Don't worry; we can also stress test your portfolio against specific market conditions, illustrate various scenarios, discuss your 95% Probability Range, and set expectations for what is normal behavior for your investments.



We can also visually stress test your proposed portfolio, model different scenarios, discuss your 95% probability range, and set expectations for what's normal behavior for your investments before we decide what' portfolio is right for YOU.



How much risk do you **need**?

We can chart a path to retirement using a simple, intuitive approach. We'll visualize the probability of a successful retirement and adjust in realtime.

All investing involves risk including loss of principal. No strategy assures success or protects against loss.



“You’ll love how we’ll generate a realtime, plug-and-play **retirement map** to visualize the probability of success in the future. We’ll make sure your Risk Number and savings plan aligns with what you’ll need in order to reach your goals.”



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





Questions?

