

# Building Your Investment Strategy Using Riskalyze



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

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



POWERED BY **riskalyze**

# Let's get started.



## Capture 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,



## 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 comfortable with your expected outcomes. The resulting proposed portfolio will include projections for the potential gains and losses we should expect 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 increase the probability of success.



Screenshots: Risk Number® and sample six-month 95% probability range (left), and a sample Retirement Map (right).

**IMPORTANT:** The projections or other information generated by Riskalyze regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results and are not guarantees of future results.

Investing is subject to risk which may involve loss of principal. No strategy assures success or protects against loss. Past performance is no guarantee of future results.

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