

Building Your Investment Strategy Using Riskalyze

With Riskalyze We Can:

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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.

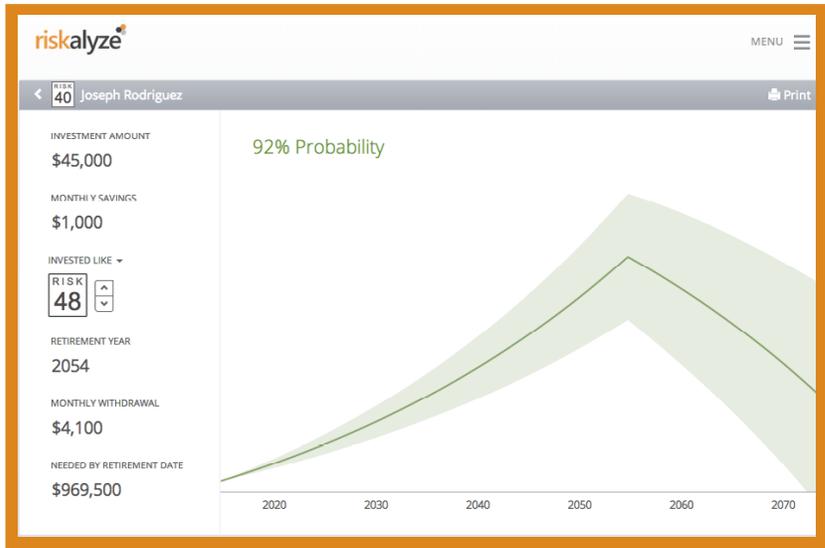


Pursue Your Retirement Goals

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.

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

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



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Risk tolerance is an Investor's general ability to withstand risk inherent in Investing. This risk tolerance questionnaire is designed to determine your risk tolerance and is judged based on three factors: time horizon, long-term goals and expectations, and short-term risk attitudes. The adviser uses their own experience and subjective evaluation of your answers to help determine your risk tolerance.

There is no guarantee that the risk assessment questionnaire will accurately assess your tolerance to risk. In addition, although the advisor may have directly or indirectly used the results of this questionnaire to determine a suggested asset allocation, there is no guarantee that the asset mix appropriately reflects your ability to withstand investment risk.