

# Building Your Investment Strategy Using Riskalyze

Riskalyze is award-winning technology that quantifies 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.**



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Powered By

**riskalyze**

# Let's get started.

RISK  
42



## DEFINE YOUR RISK NUMBER

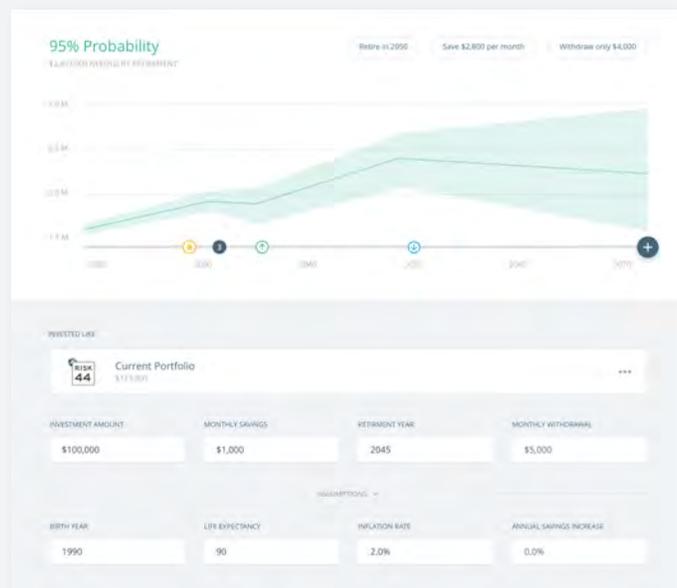
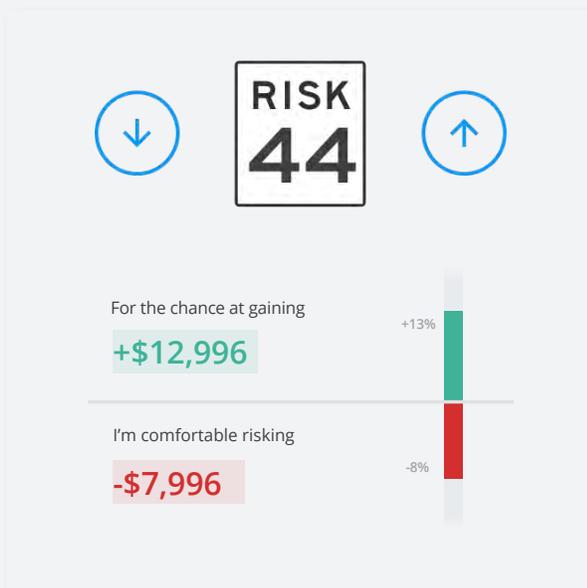
The first step is to answer a 5-minute questionnaire that covers topics such as portfolio size, top financial goals, and what you're willing to risk for potential gains. Then we'll pinpoint your exact Risk Number to guide our decision making process.

## 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.



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Whenever you invest, you are at risk of loss of principal as the market fluctuates. Past performance is not indicative of future results. Purchases are subject to suitability. This requires a review of an investor's objective, risk tolerance, and time horizons. Investing always involves risk and possible loss of capital.