Building Your Investment Strategy
Using Riskalyze

Riskalyze is cutting edge technology that identifies your acceptable levels of risk and reward

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.

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.



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

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.

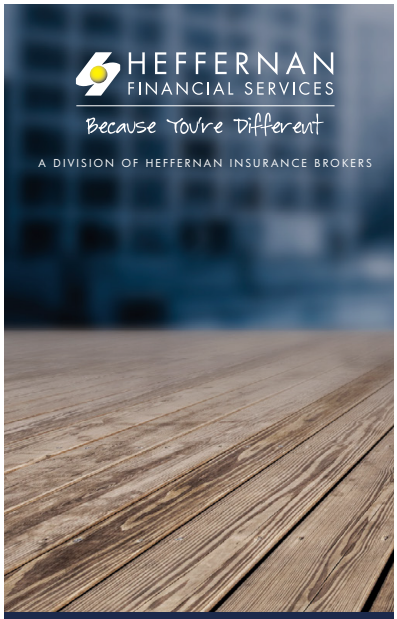
Align Your Portfolio

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.



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All investing involves risk, including possible loss of principle. No investment strategy can guarantee a profit or protect against loss.