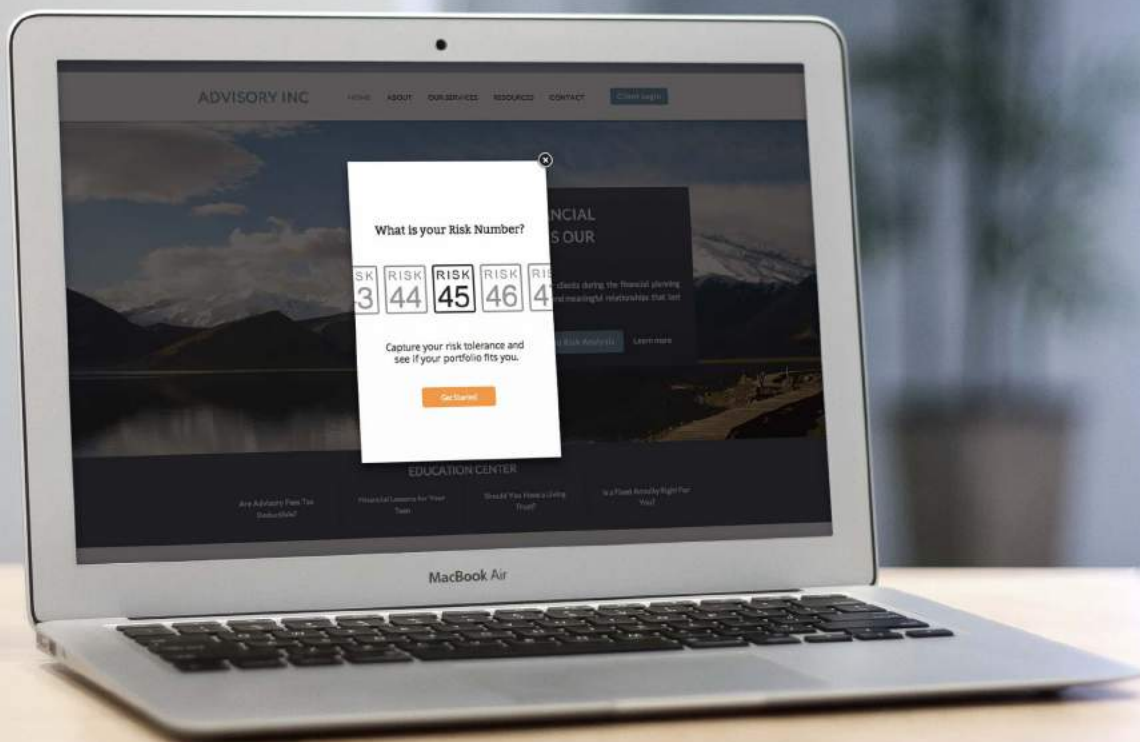


# How I use Riskalyze to serve YOU



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POWERED BY  
**riskalyze**

Riskalyze is **cutting edge technology** that pinpoints your acceptable levels of risk and reward with **unparalleled accuracy**. Riskalyze helps me ensure that your portfolio aligns with YOUR investment goals and expectations.

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

# How Does Riskalyze Work?

## Capture Your Risk Number

The first step is to take a 5 minute quiz 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.



## Review Your Current Investments

It turns out 4 out of 5 people have more risk in their portfolios than they previously realized. Riskalyze technology empowers us to make sure the Risk Number of your portfolio matches your personal Risk Number.

## Align Your Portfolio to Match

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.



# How Does Riskalyze Work?

## Stress Test Investments

Stress tests illustrate how your proposed portfolio would have fared through various market events over the past 8 years, including the financial crisis and recovery.

### 2013-Like Bull Market

The estimated performance is the likely result if this portfolio had been invested from January 1, 2013 to December 31, 2013.  
During that time frame, the S&P 500 gained 32%.

**14.4%**

ESTIMATED PERFORMANCE  
JAN 1, 2013 - DEC 31, 2013

### Calendar Year 2008

The estimated performance is the likely result if this portfolio had been invested from January 1, 2008 to December 31, 2008.  
During that time, the S&P 500 dropped 38%.

**-15.8%**

ESTIMATED PERFORMANCE  
JAN 1, 2008 - DEC 31, 2008

### Financial Crisis Redux

The estimated performance is the likely result if this portfolio had been invested from October 15, 2007 to March 2, 2009.  
During that time frame, the S&P 500 dropped 53%.

**-22.3%**

ESTIMATED PERFORMANCE  
OCT 15, 2007 - MAR 2, 2009



## Review Risk & Reward Potential

We can visualize the risk and reward profile for each individual investment we propose for your portfolio. Illustrating risk, reward and diversified risk gives us a powerful tool to review before we make any final investment decisions.

## Meet Your Retirement Goals

Before we're finished, we'll also review your progress toward your financial goals by building a Retirement Map. When you're done, you'll fully understand the probabilities of success, and what we can do to increase it.

