

RISK  
1

RISK  
58

RISK  
99

# Riskalyze Best Practices

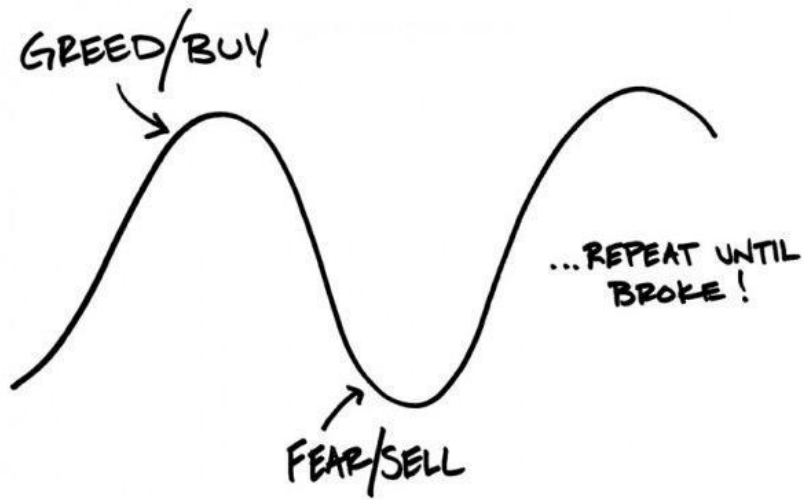
The Power of Risk Alignment



Preston Naramore  
Advisor Coach

# Today's Agenda

- Riskalyze Core 4
- Using Annuities in Riskalyze
- Generating Reports
- Models and Discovery



## Why is Investing Broken?

The Short Term Gets Ignored

Investors are Overwhelmed

Bad Expectations Sabotage Us

Stereotypes Don't Work





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*"We're targeting an 8% return with this portfolio."*

## Why is Investing Broken?

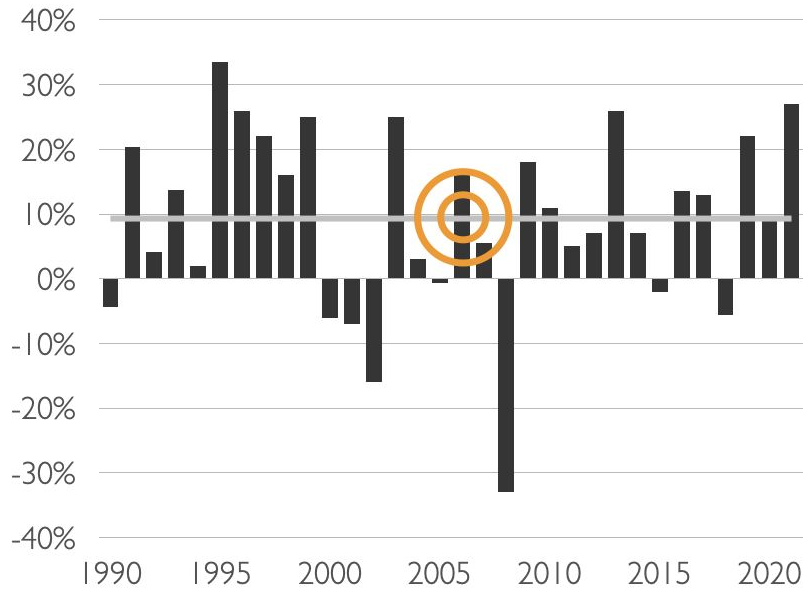
The Short Term Gets Ignored

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*The one thing the market almost never hits is its own average.*

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**“Aggressive”**



**“Moderate”**



**“Conservative”**

## Why is Investing Broken?

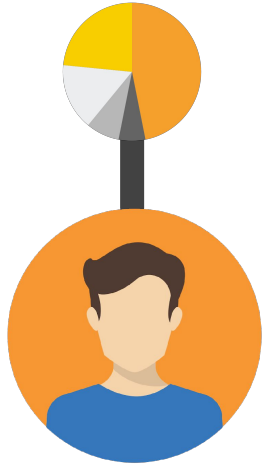
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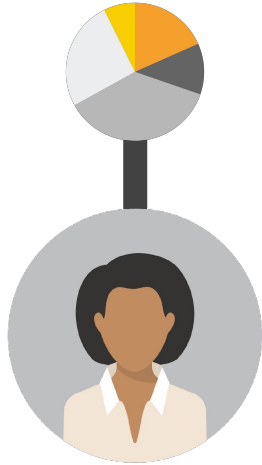
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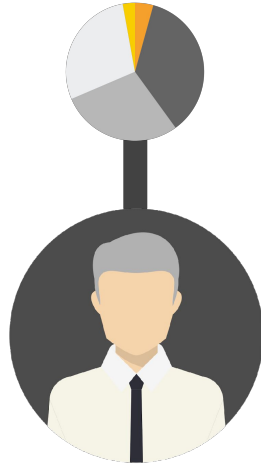




**"Aggressive"**



**"Moderate"**



**"Conservative"**

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~~"Aggressive"~~



In fact, a team of academics assessed our methodology and data. The results?  
**52% of 20-29 year olds aren't aggressive.**



~~"Conservative"~~

Stereotypes didn't work any better for older folks.  
**53% of 70-79 year olds aren't conservative.**



~~"Aggressive"~~



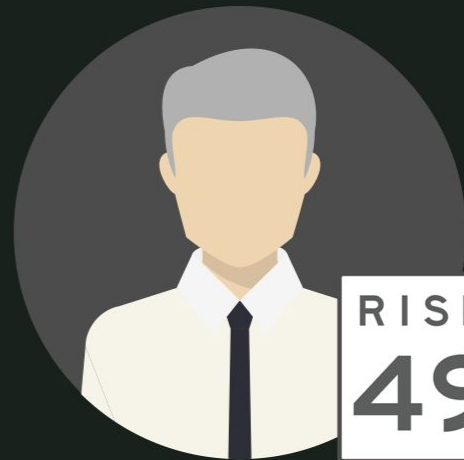
RISK  
22

~~"Moderate"~~



RISK  
82

~~"Conservative"~~



RISK  
49

It turns out, people are individuals.



**Built on a Nobel  
Prize-winning  
framework.**



## By the Numbers...

\$1M

3 out of 4 advisors saw their book of business grow over \$1M after 90 days of using Riskalyze

85%

85% of Advisors who have a dedicated risk solution use Riskalyze

94%

Large Broker Dealer improved prospect close rate from 40% to 94% after implementing Riskalyze

30K+

Proven by tens of thousands of Advisors

5M

Over 5 Million Risk Numbers generated to date

50%

Half of the Top Barron's Firms choose Riskalyze

riskalyze



**It all starts with  
The Risk Number®**

It's the foundation of the world's  
First Risk Alignment Platform

WANTS

CREATE REPORT  
START MEETING

Risk Tolerance

**RISK 42** Doug Lip **RISK 42**  
 ulipman@example.com  
 PROSPECT

OVERVIEW PORTFOLIO PROPOSALS RISK NUMBER CHECK-INS RETIREMENT MAP

Portfolio Risk

HAS

SHOULD HAVE

Current Portfolio	Current Portfolio	Proposed Portfolio
<b>RISK 68</b> \$2,282,045 • 2 ACCOUNTS	<b>RISK 68</b> \$2,282,045 • 2 ACCOUNTS	<b>RISK 41</b> \$2,282,046 • 2 ACCOUNTS
<b>Riskalyze GPA</b> 2.4	<b>Riskalyze GPA</b> 2.4	<b>Riskalyze GPA</b> 4.1
Potential Annual Return: 0.50%	Potential Annual Return: 0.50%	Potential Annual Return: 5.26%
Annual Dividend: 2.04%	Annual Dividend: 2.04%	Annual Dividend: 2.80%
Expense Ratio: 0.08%	Expense Ratio: 0.08%	Expense Ratio: 0.60%
	48% STOCKS 11% BONDS	37% STOCKS 52% BONDS

Proposed Risk

NEEDS

Retirement Map	Retirement Map
LAST UPDATED ON INVALID DATE	LAST UPDATED ON INVALID DATE
	2035 95% RETIREMENT YEAR PROBABILITY

Risk Capacity



# Learning Resources

Riskalyze Knowledge Base

Riskalyze Academy is the self-directed learning platform for all employees 24/7. Now, you can certify yourself with a library of lessons full of interactive media, and it's all included in your Riskalyze subscription.

Pro Tip: Brand new to Riskalyze? Try the "Getting Started with Riskalyze" learning path.

RISKALYZE ACADEMY

- Help Button
- Live Chat
- Riskalyze Academy
- Knowledge Base
- [riskalyze.com/training](https://riskalyze.com/training)

We call it "The Encyclopedia of Riskalyze."

Our Knowledge Base contains hundreds of searchable articles that'll get you quick answers to your questions about Risk Alignment, Trading Automation, and more.

KNOWLEDGE BASE

