

Crafting Your Investment Strategy Using the Risk Number®





Let's talk about Risk.

Subjective risk questionnaires nearly always miss the mark.



"Aggressive"



"Moderate"



"Conservative"



That's because the old way of assessing risk,
stereotyping investors with subjective
semantics, simply doesn't work.



~~"Aggressive"~~



~~"Moderate"~~



~~"Conservative"~~



My approach uses the Risk Number. It's built upon a Nobel Prize-winning framework, and everyone has one.

What's yours?



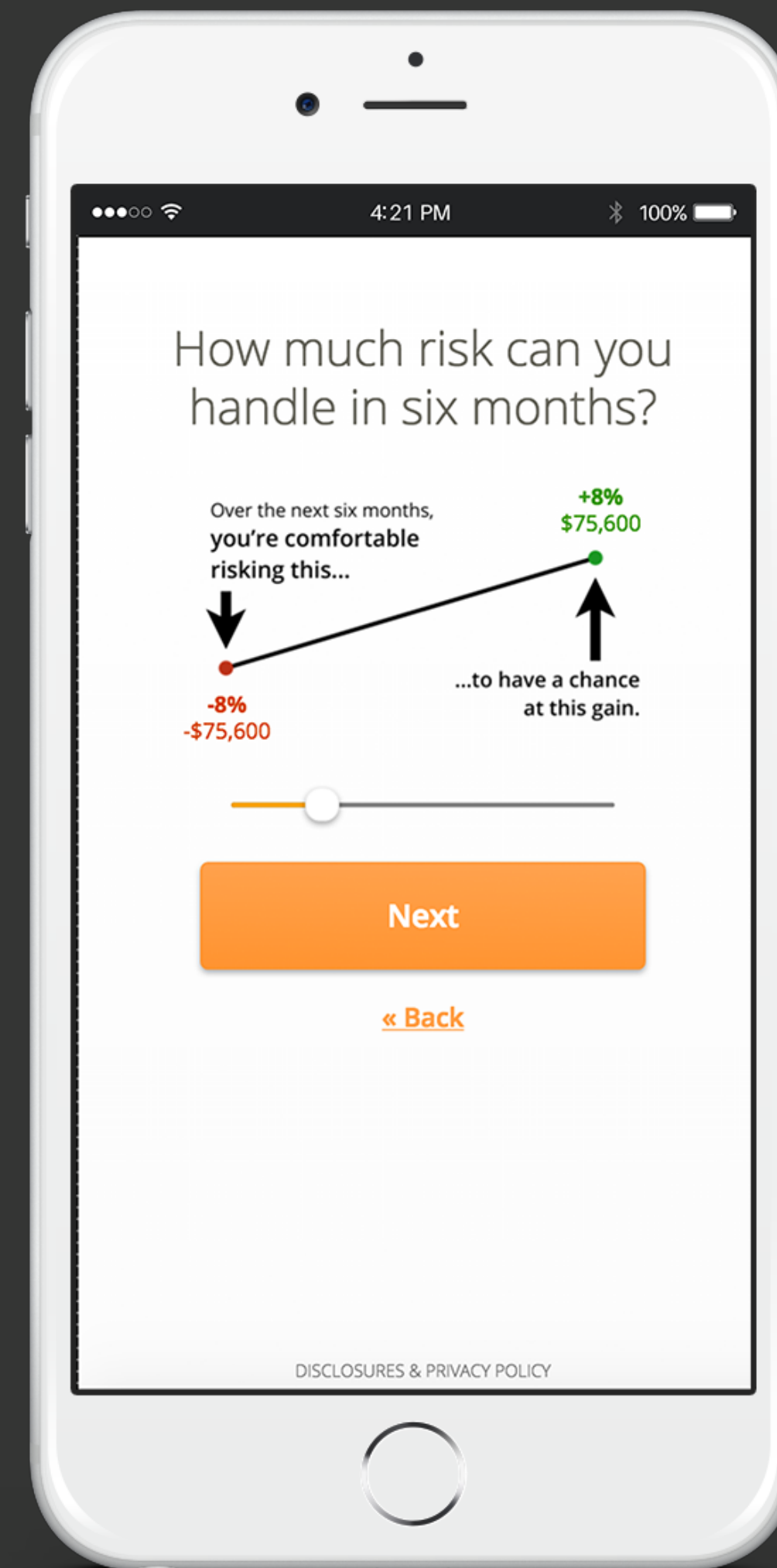
My Process

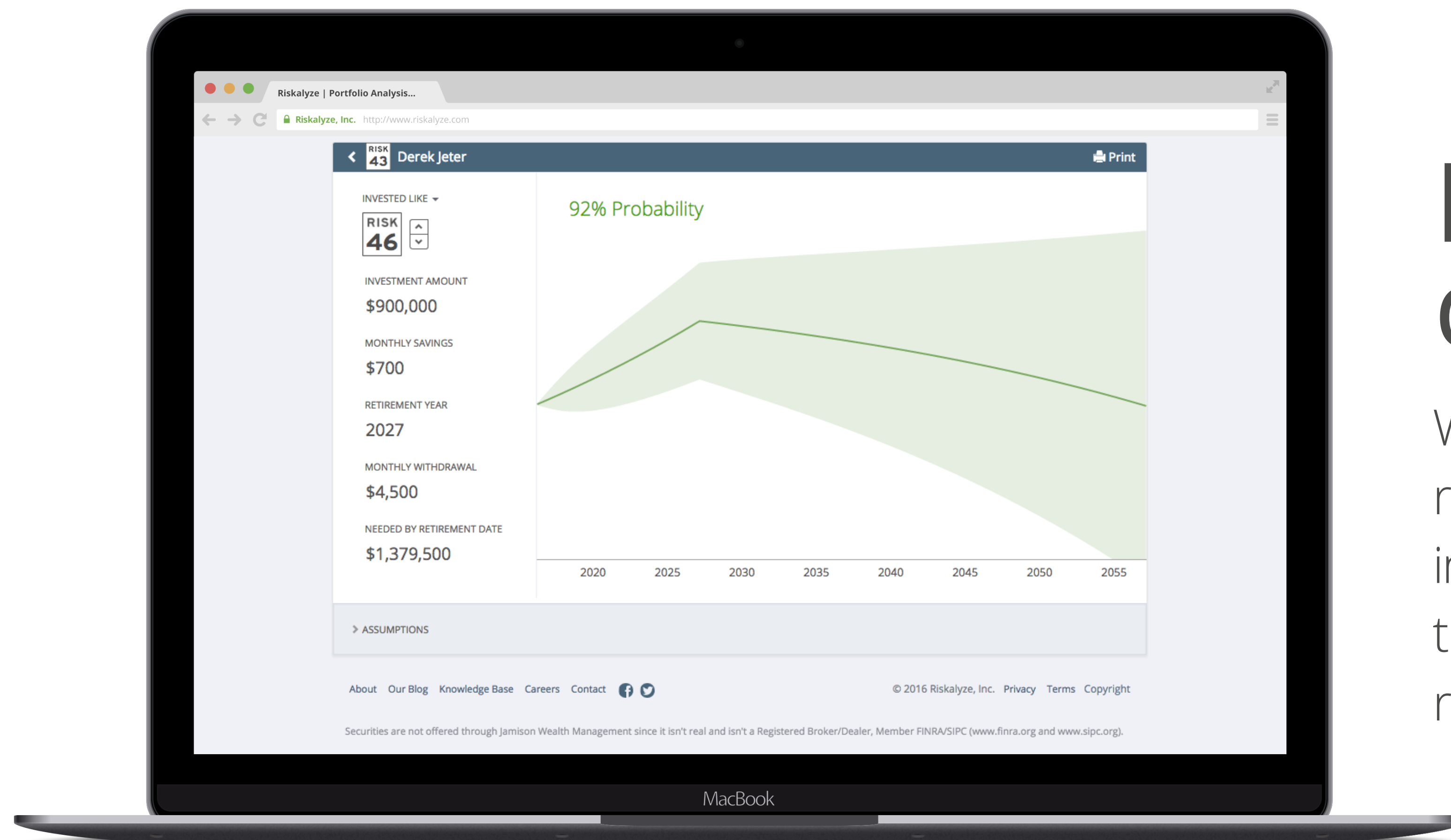
I combine my depth of investment knowledge,
investment philosophy, and cutting-edge technology
in order to empower fearless investing.



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.





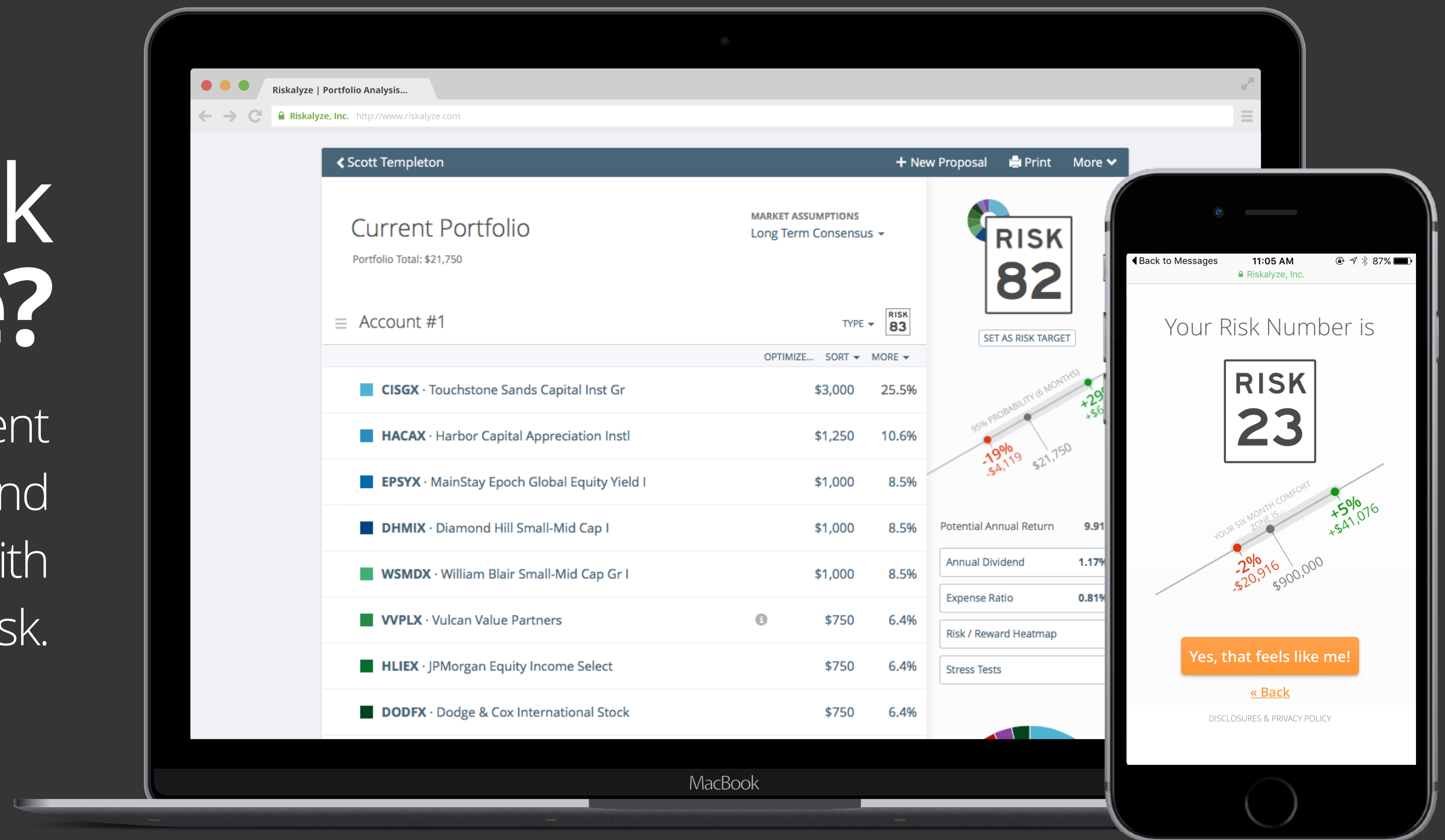
How much risk do you **need**?

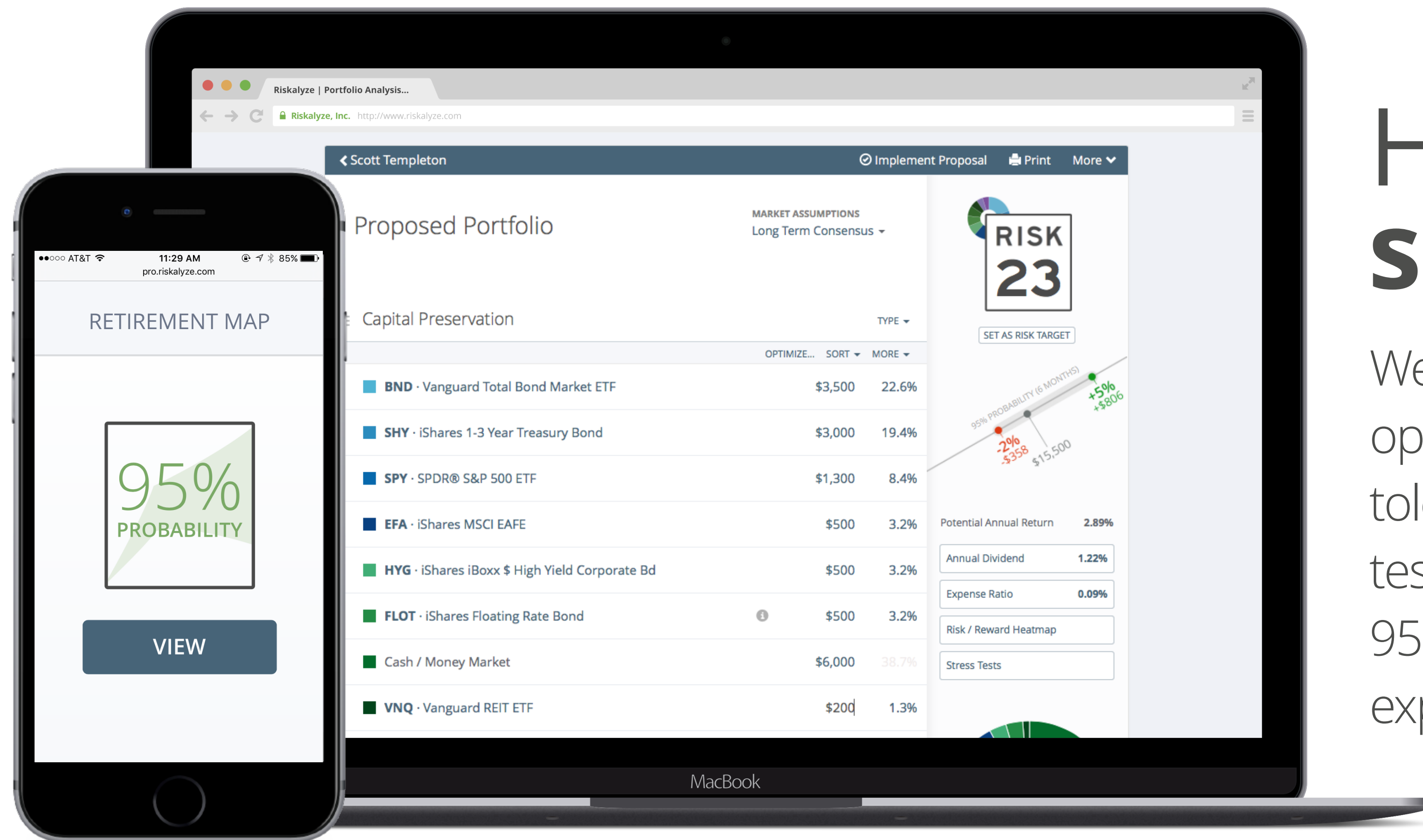
We can chart a path to retirement using a simple, intuitive approach. We'll visualize the probability of a successful retirement and adjust in realtime.



How much risk do you have?

If you've already got an investment portfolio, we can quickly import it and see if your Risk Number aligns with your current amount of Risk.





How much risk should you have?

We'll use all these factors to build an optimized portfolio that fits your risk tolerance and goals. We can then stress test your new portfolio, discuss your 95% probability range, and set expectations for the future!





Questions?

