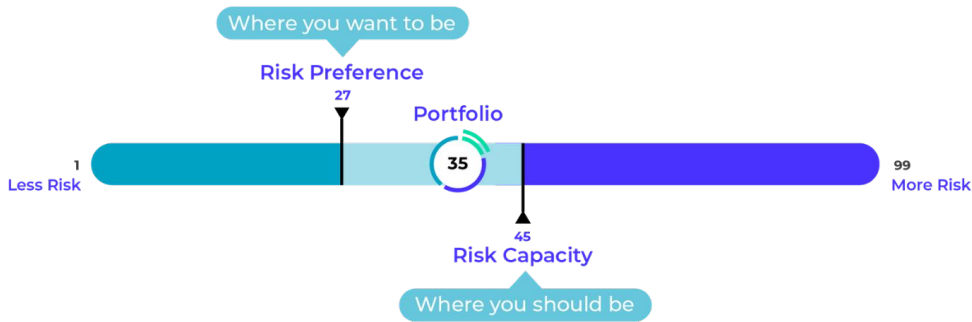


## Better Alignment With Clients

Many investors get placed in investment portfolios that don't align with the facts in their current life situation. That's because a lot of portfolio matching is based on a subjective risk tolerance questionnaire that could vary wildly depending on what's going on in the market, or how someone feels that day. Then as markets change many clients are left with results either above or below their expectations.

By taking a more **holistic, multi-scoring approach**, TIFIN Risk takes into account both the client's risk preference, and even more importantly, their **relevant life details & financial situation**, or risk capacity.



### How It Works:

- **A Client Centric Experience:** TIFIN Risk's questionnaire is built on 9 to 11 simple-to-answer questions that most individuals complete in under 5 minutes
- **Design With Engagement At The Core:** TIFIN Risk pulls in information from credible sources on the back end using data mining and machine learning to better understand and assess a client's risk tolerance. This allows for fewer questions.

### Why Risk Capacity:

- A client is **more aligned with their financial goals** when their portfolio is closer to their risk capacity score.
- Risk Capacity is based more on the facts of a client's life situation instead of how the client feels today.
- On average annually everyone experiences at least one life event that impacts their overall investment objectives.

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