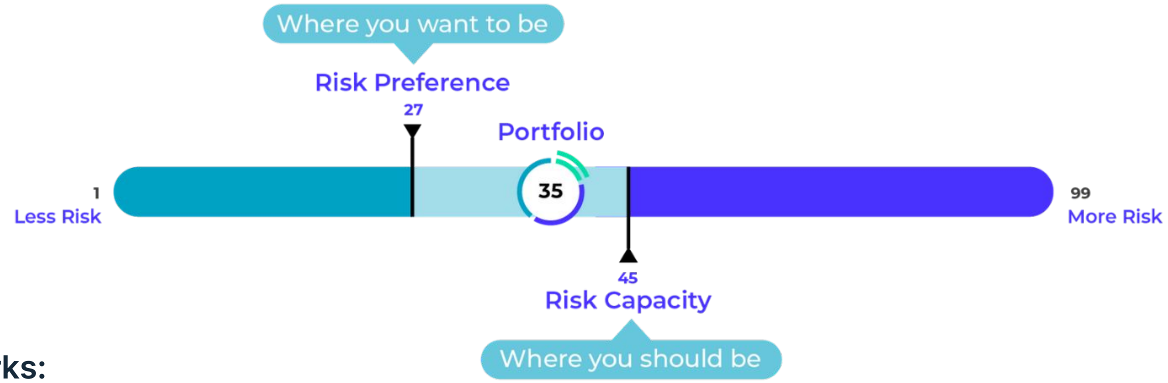
TIFIN Risk

TIFIN Risk is a platform designed to help advisors and their clients share a common view of a client's risk profile and gain alignment on appropriate investment strategies that transcend preference alone.

Better Alignment With Clients

Many investors are 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. Show prospects where they should be with a tool that helps drive conversion.



How It Works:

- **A Client-Centric Experience:** TIFIN Risk's questionnaire is built on simple-to-answer questions that most individuals complete in under 5 minutes, making it ideal to use with prospects.
- **Designed With Engagement At The Core:** TIFIN Risk pulls in information using data mining and machine learning to better understand and assess a client's risk tolerance. This allows for fewer questions, creating a better client experience.
- **Compliance Needs:** Our questionnaire was designed to assist with Regulation Best Interest

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 on the **facts of a client's life situation** instead of just how the client feels at one particular point in time.
- On average, investors each experience **at least one life event per year** that impacts their overall investment objectives and could change their risk preference.