Simple Fund Advisor: Easily Allocate Funds to Create Optimal Portfolio

- Swipe left-and-right to choose risk level
- See optimized fund allocations for any risk level
- Experiment with various portfolios visually
- Compare return, volatility and factor exposure
- Use risk-aversion profiler to discover true risk preference*
- Calculate expected annual return required to achieve retirement goal*

** Available Q4 2022*

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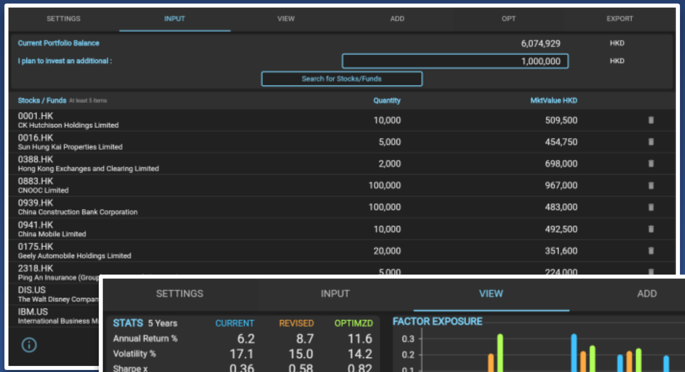
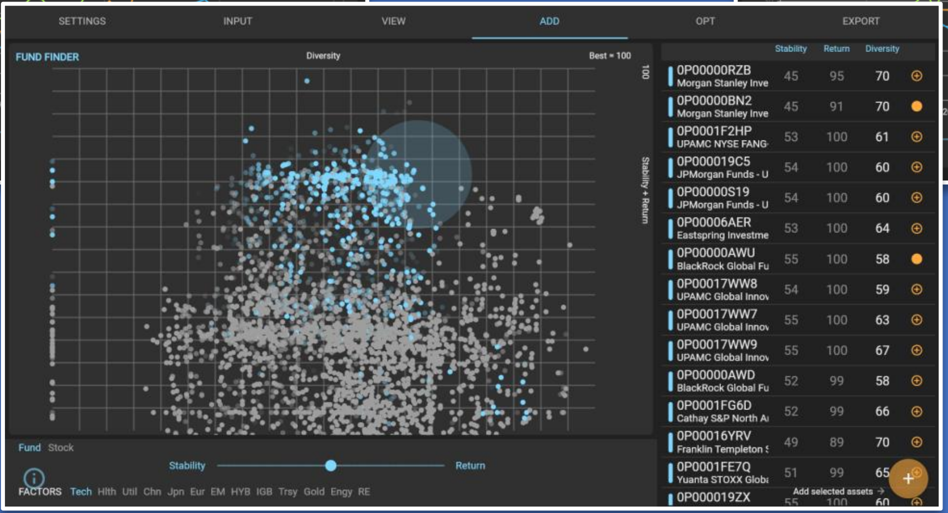
Pro Fund Advisor: 5 Steps to Create Personalized Customer Portfolios

1 Input customer's existing holdings to enable personalized recommendations



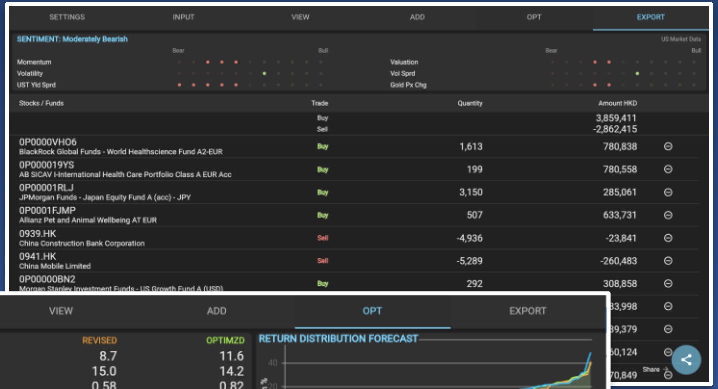
2 View portfolio allocation, performance metrics, factor exposure and backtest for each portfolio

3 Add best diversifying funds using patent-pending idea generating matrix



4 Optimize portfolio to generate efficient frontier and view portfolio forecasts based on customized bull/bear scenarios

5 Export recommended trade list to achieve optimized portfolio



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