

PLATFORM PARTNER

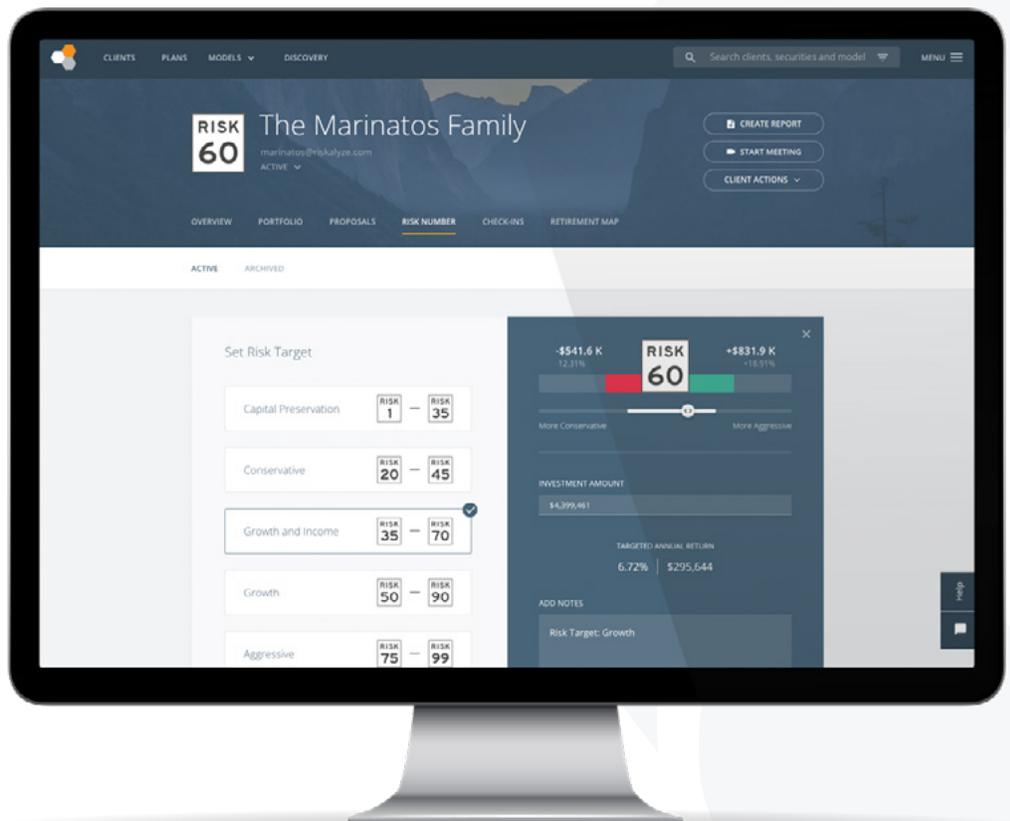
Portfolio Risk Analysis



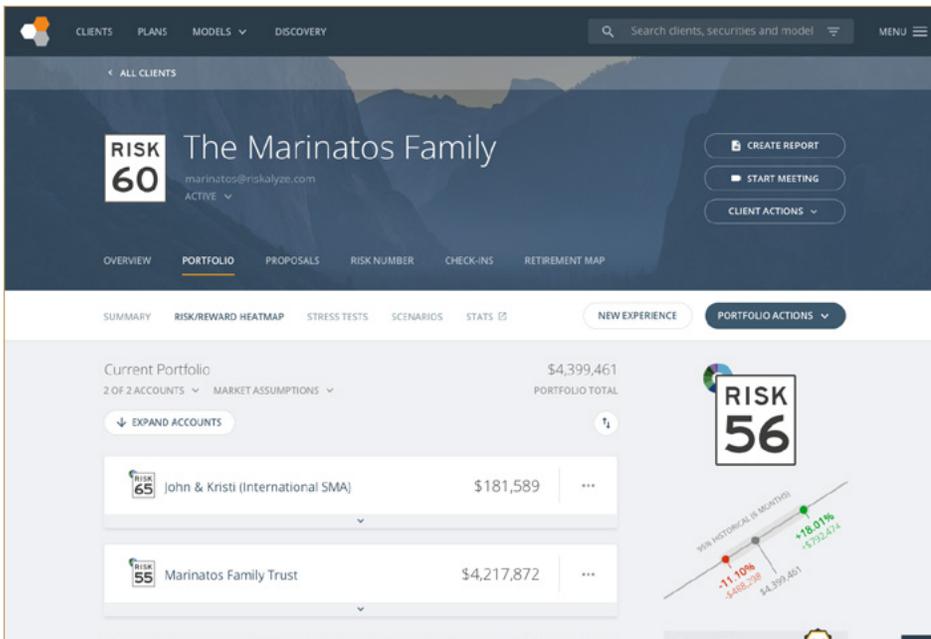
Riskalyze aligns the conversation so risk makes sense to both you and your clients

Market fluctuations can result in emotional decision-making. To counteract this, Riskalyze invented the Risk Number®, which powers its risk Alignment Platform. The Risk Number is an objective, mathematical approach that removes subjectivity by quantifying an investor's portfolio risk. Financial advisors can use the Risk Number to drive conversations around how much risk investors can handle over the short term in order to meet long-term objectives.

Thanks to the native integration, advisors can use Riskalyze's powerful risk alignment tools right inside of Black Diamond which allows them to effortlessly incorporate risk into their clients' complete wealth picture.



Set clear expectations with investors by objectively and quantitatively pinpointing portfolio risk.



The perks of partnership

Advisors can use Riskalyze to accurately determine a client's risk tolerance level, then assess the client's current portfolio risk against their Risk Number. Our teams' collaboration on building a unified experience makes it easy for advisors to quickly incorporate the risk component into client meetings and discussions.

With Riskalyze and Black Diamond, advisors can:

- Consolidate their technology into one centralized, integrated solution
- Enhance client dialogue by incorporating Riskalyze content into presentations and the *Client Experience* portal
- Monitor risk within client portfolios on a daily basis as part of the overall client dashboard
- Stay compliant by documenting an assessment and portfolio risk of a client
- Propose new portfolios to clients based on risk alignment goals
- Streamline support by having a single point-of contact for both platforms

A purposeful suite of tools

With the Black Diamond Wealth Platform at the heart of your business, you can build an end-to-end, best practice technology stack, enabling you to manage your clients' complete wealth picture and deliver tech-powered services that exceed their expectations.

Black Diamond's innovative, cloud-based tools and best-of-breed integrations help you optimize your business and strengthen your connections with both your clients and prospects.

FOR MORE INFORMATION

If you have questions or would like to learn more, please call 1-800-727-0605 or email info@advent.com. You can also visit blackdiamond.advent.com.