

SEQUOIA
WEALTH ADVISORS
& Investment Management, Inc.



Crafting Your Investment Strategy





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”~~



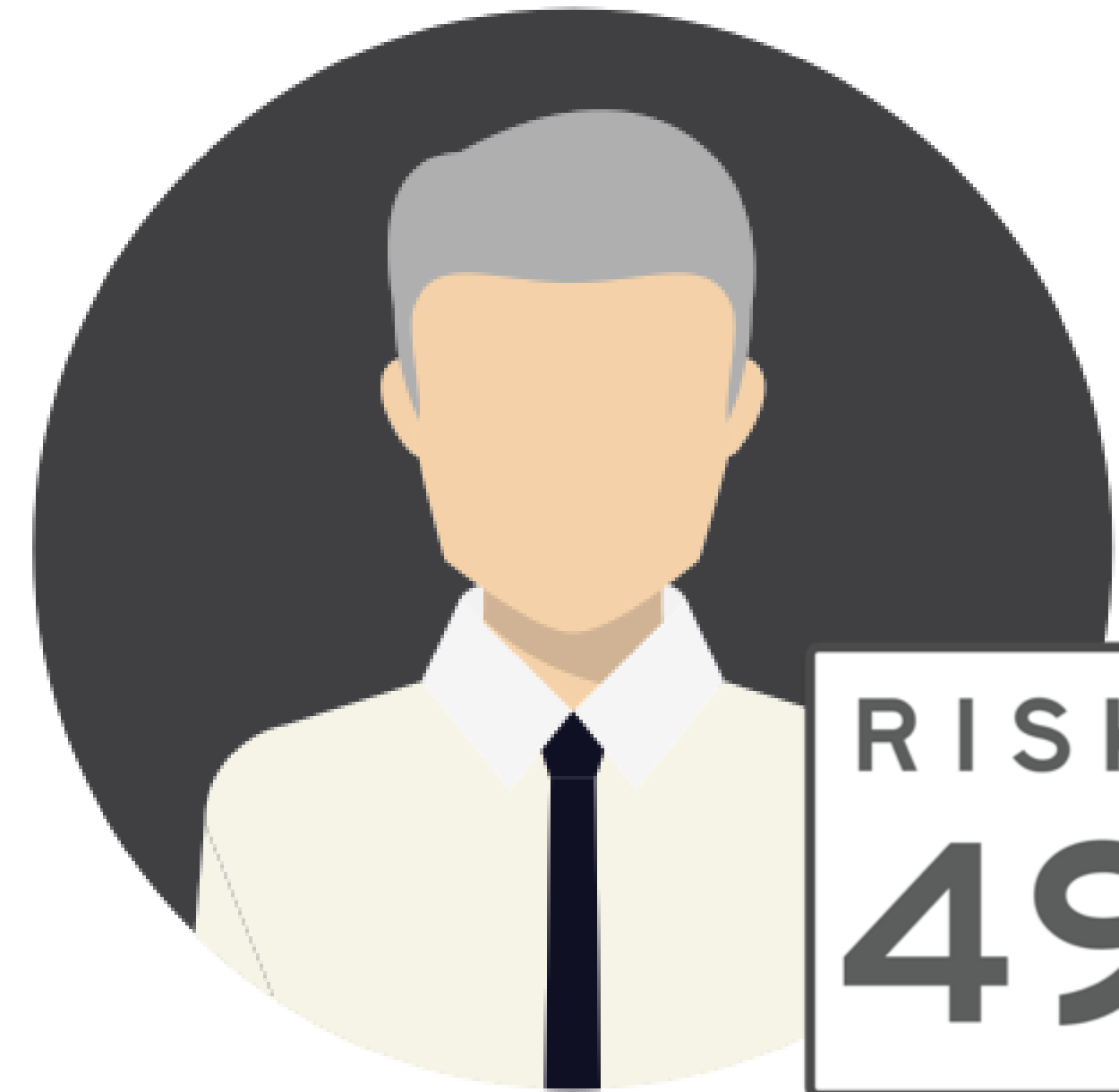
RISK
22

~~“Moderate”~~



RISK
82

~~“Conservative”~~



RISK
49

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





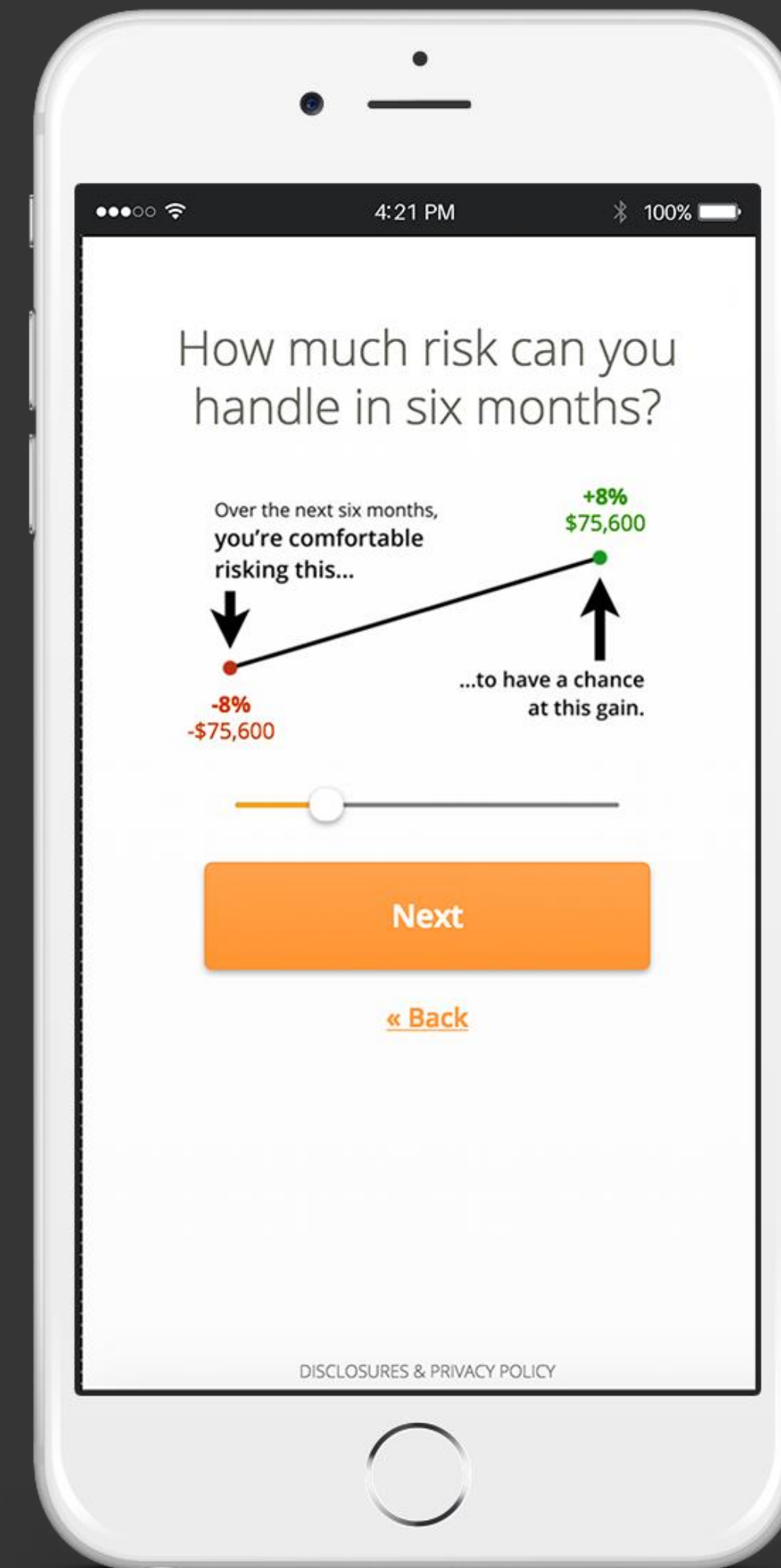
My Process

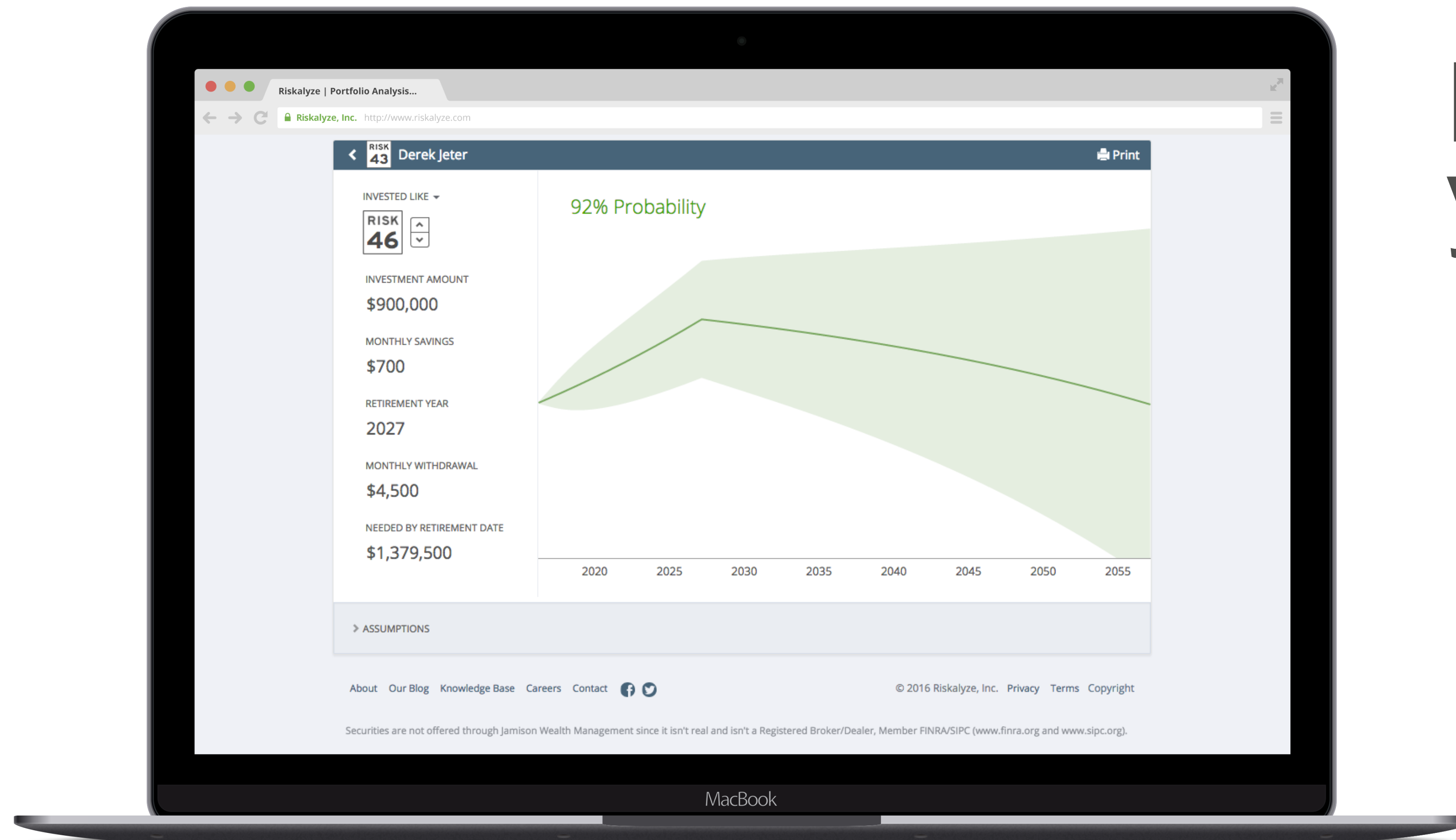
We combine my depth of economics and investment knowledge, investment philosophy, and the client's financial plan and life's goals in order to empower fearless investing.



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**?

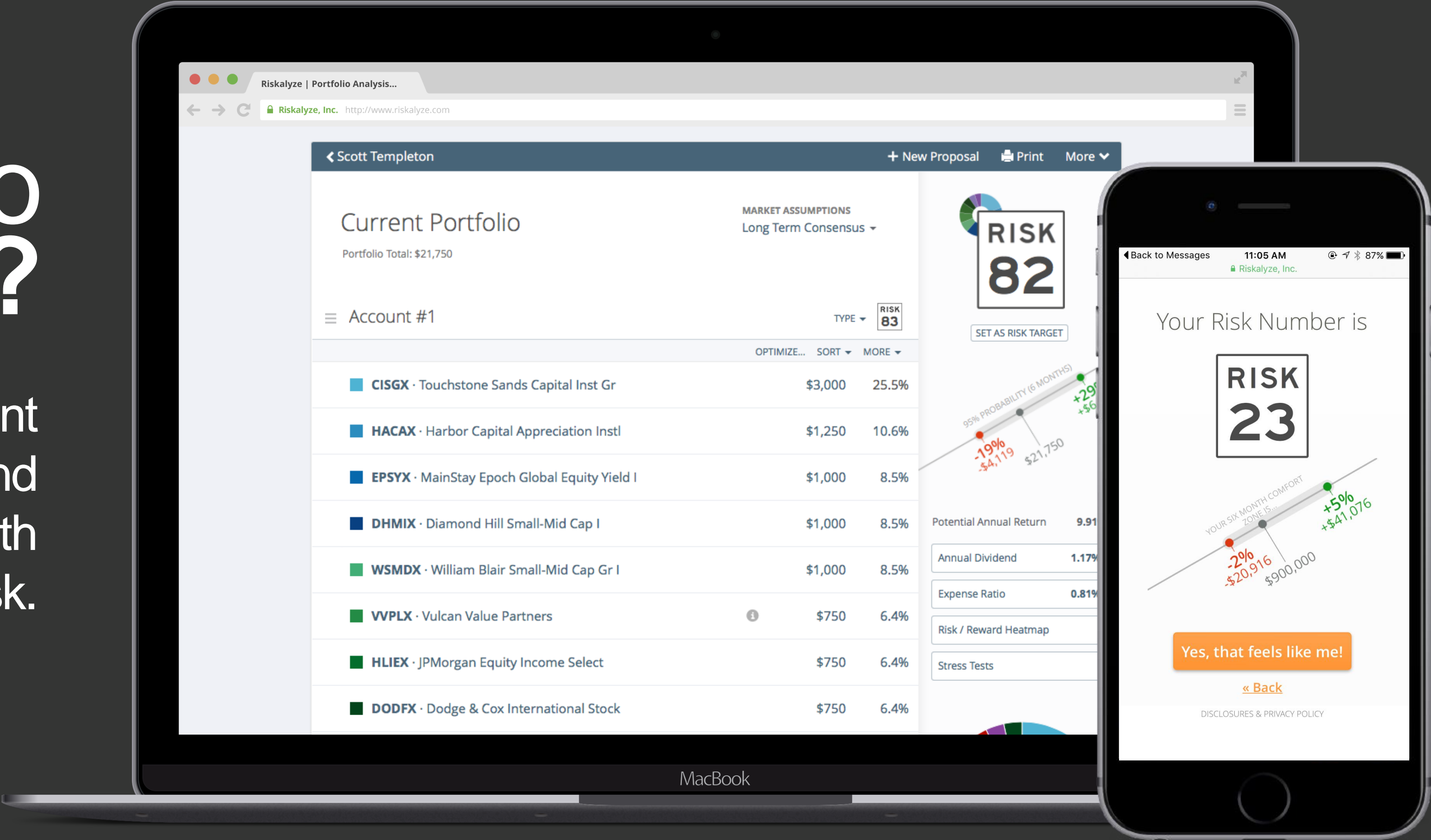
We can chart a path to retirement using a simple, intuitive approach. We'll visualize the probability of a successful retirement and adjust in realtime.

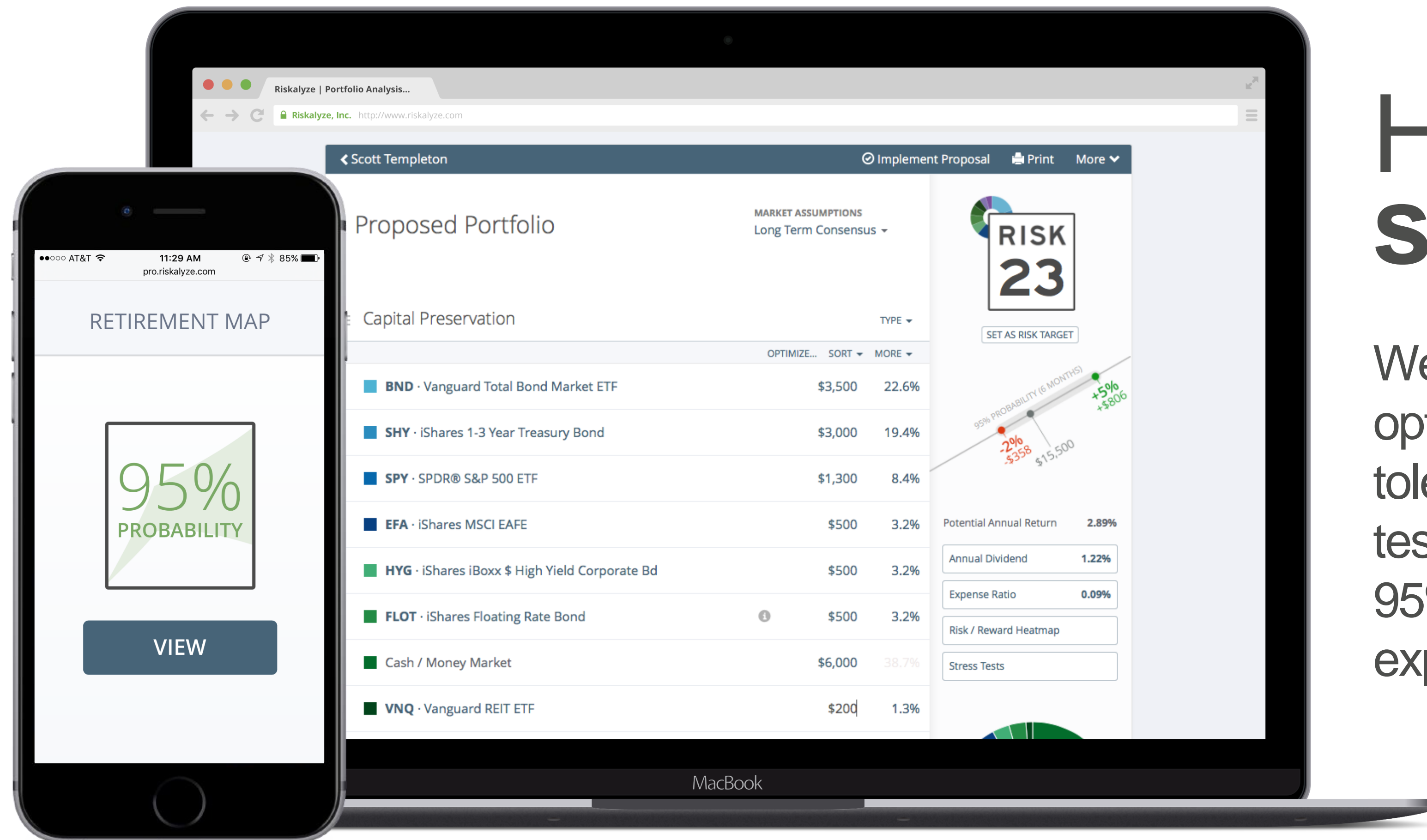
All investing involves risk including loss of principal. No strategy assures success or protects against loss.



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?





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Required Disclaimers:

- This material is for general information only and is not intended to provide specific advice or recommendations for any individual. There is no assurance that the views or strategies discussed are suitable for all investors or will yield positive outcomes. Investing involves risks including possible loss of principal. Any economic forecasts set forth may not develop as predicted and are subject to change.
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