

Digital Allocation Tool

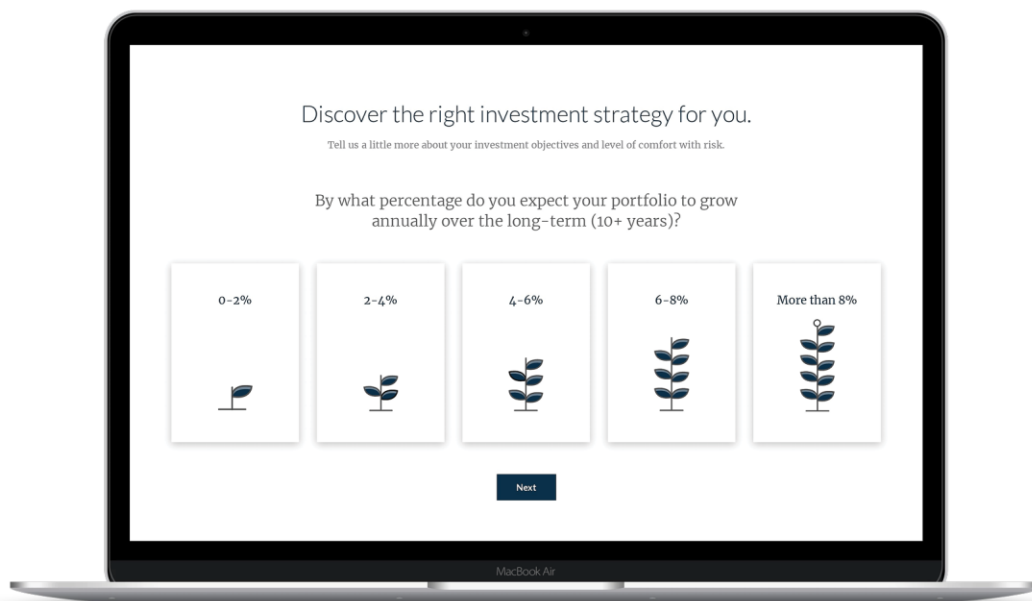
Find Your Road to Retirement

Imagine you're driving down the highway and the speed limit is 65 mph. Some of us will set our cruise control right at 65. Some of us may want to take extra precautions and go a bit slower, always keeping an eye out for debris or monitoring the storm clouds. Some of us may attempt to reach our destination faster, accelerating to 70, maybe even 75 mph. However, no one is willing to recklessly drive 150 mph. The same can be said for your risk level when saving for retirement – and that's why we offer our Digital Allocation Tool.



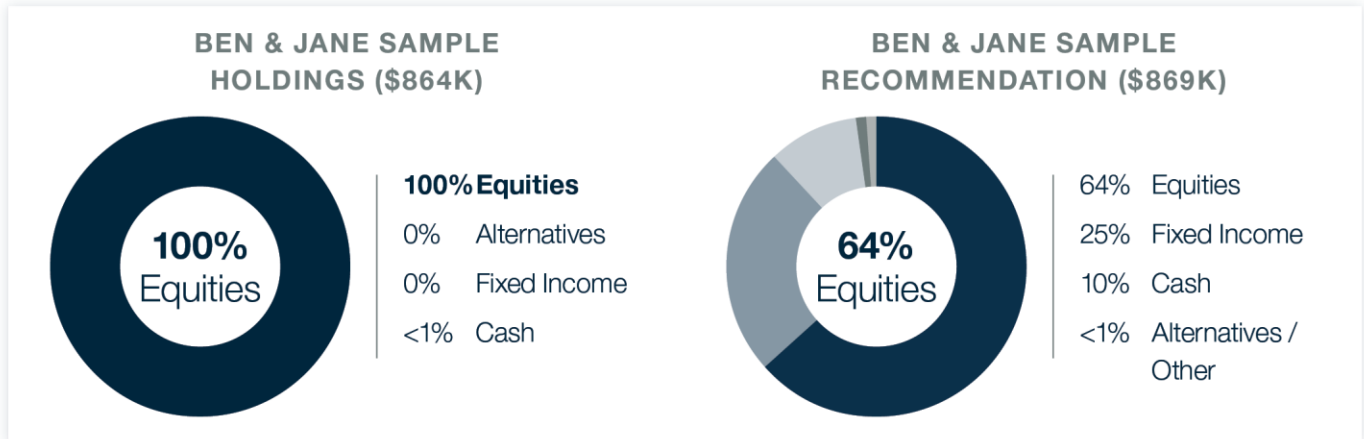
Step 1: Determine Your Risk Profile

Taking aim is the first step to hitting the mark. Therefore, the first step to making sure your assets fit your risk profile, you first must determine what that risk level is. You do that by taking our Risk Tolerance Questionnaire – seven questions that will determine a recommended asset allocation for you.



Step 2: Compare to Your Current Retirement Allocation

Now that you know your risk profile, it's time to see where there are outliers in your current investment strategies. This is a confidential process where we input your current investment information into the Digital Allocation Tool. It then measures your investment strategies against your risk profile and looks for gaps.



Step 3: Align Risk Profile and Asset Allocation

Once you know how your current portfolio stacks up against your risk profile, the Digital Allocation Tool will show you how you can adjust your assets to make them match. Would you be willing to accept the possibility of the lowest lows as well as the hope of receiving the potential five-year return? How would you expect your portfolio to perform in a down market? Does the risk outweigh the possible rewards? You can also adjust any of the variables and run instant projections to help you make informed decisions about your investment strategies every step of the way.



Contact us today to learn how our wealth advisors can help you put a plan in place to help you pursue your important financial and lifestyle goals with confidence.

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