

RISKALYZE IS NOW FULLY INTEGRATED ON THE TCA PLATFORM

A powerful tool to manage client risk



Riskalyze is now fully integrated with the Trust Company of America (TCA) platform. Riskalyze is a risk management tool that gives clients a clear picture of where they are on the risk frontier and where they need to be. It helps you, as the advisor, capture a quantitative measurement of client risk tolerance and then build suitable portfolios that meet client expectations for risk.

The integration of Riskalyze with TCA's powerful technology platform provides greater efficiencies for advisors including:

- **More efficient risk analysis and management of client accounts.** As you make adjustments or updates to client accounts on the TCA platform, these changes can be automatically fed into your Riskalyze data, which processes the investments and allocations within seconds. And from the Riskalyze user interface, you can search for your TCA clients and seamlessly add their holdings to a Riskalyze client profile.
- **More efficient risk analysis and management of investment models.** You no longer need to make double entries – one for Riskalyze and one for TCA – to analyze the risk profiles of your investment models. Your models in TCA can be automatically fed into your Riskalyze data, so you can see and adjust your models according to desired risk levels. As you make model changes on the TCA platform, these changes will automatically sync within Riskalyze as well.
- **Special TCA pricing.** TCA advisors enjoy 25% off (now only \$109/month) for the Solo version of Riskalyze and 20% off (now only \$475/month) for the Team version (up to 10 advisors). For Enterprise pricing (more than 10 advisors), please contact Riskalyze at 1-855-RISKALYZE.

If you would like more information or are interested in setting up your real-time integration between TCA and Riskalyze, please contact your TCA Relationship Manager.