Stress Tests

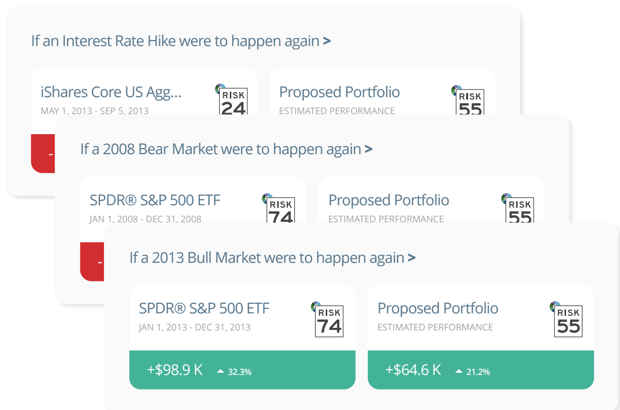
Run portfolios through historical events like the 2008 Financial Crisis or 2013 Bull Market to help clients understand what it means to control risk or beat the market.

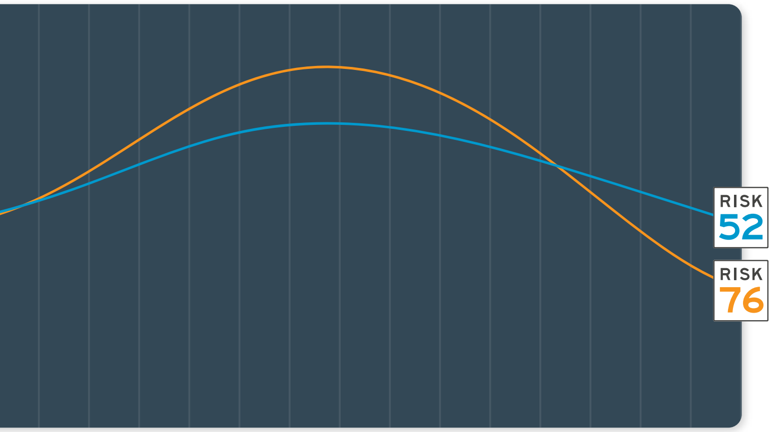
Select   Elite   Enterprise

What if 2008 happened again?

You know better than anybody that clients want to know what's "normal" for their portfolio. And you also know setting expectations based on average return doesn't work — after all — the market almost never hits its own average!

Stress Tests give you preset market scenarios to illustrate hypotheticals with your clients. These examples are not only powerful for illustrating how you've built a portfolio (maybe it's fortified from interest rate spikes), they're also a game-changer when it comes to reinforcing how you set a client's expectations.





Control risk? Or beat the market?

There's no better way to illustrate your answer to the question "why is the market beating my portfolio?"

You can show them that the S&P 500 is a Risk Number 76, and while their Risk Number 52 portfolio won't make as much when markets are up, it'll lose a whole lot less when markets are down. They'll remember exactly why they're a 52 — clients just "get it."

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