



Trading Dashboard

The Trading Dashboard surfaces all of your decision points in an easy, convenient inbox. With our One-Click Fiduciary™ technology, you can easily approve or snooze trades across your entire book of business.

Available with Riskalyze Trading

Trade and rebalance client accounts with ease.

The Trading Dashboard is armed with a powerful set of filters that allow you to quickly find the accounts and trades you need with just a few clicks. Once filtered by trade reason, custodian, or specific advisor, you can dive into the specifics of each trade to make sure you are in the know.

Clicking on an account will show you the various trade reasons, as well as Risk Number® drift, estimated capital gains or losses, and even the individual buys and sells triggered by that event.

TAX LOSS HARVESTING

RESULTS AFTER TRADE

15

POSITIONS

\$125,687

EST. CASH

RISK
52

| Buy | SECURITY | SHARES | PRICE | TOTAL TRANSACTION |
|-------|----------|--------|----------|-------------------|
| | FB | 52 | \$256.82 | \$13,354.64 |
| | WBII | 272 | \$24.10 | \$6,556.12 |
| | XLF | 125 | \$24.05 | \$3,006.25 |
| Sells | SECURITY | SHARES | PRICE | TOTAL TRANSACTION |
| | MSFT | 78 | \$220.89 | \$17,229.42 |
| | XLI | 112 | \$80.95 | \$9,066.40 |
| | GE | 125 | \$6.82 | \$3,006.25 |

\$327,856
EST. GAIN/LOSS

62
TRADES



\$165,099
EST. GAIN/LOSS

24
TRADES

APPROVED

UNTIL
Tomorrow

SNOOZED

Meet One-Click Fiduciary™ technology.

Riskalyze Trading scans all of your client accounts looking for things like Risk Number drift, model allocation changes, cash distributions, and tax loss harvesting opportunities. Regardless of trade reason, every client trade will be displayed in your inbox — ready for you to take action on.

And working your way through this inbox of trades is a breeze; whether you're approving trades today or snoozing to review at a later time, there's no faster way to work through client accounts and keep everything on track.

LEARN MORE AT [RISKALYZE.COM/TRADING](https://www.riskalyze.com/trading)



Riskalyze
470 Nevada Street
Auburn, CA 95603



855-RISKALYZE
530-748-1660
Fax 530-748-1661



Follow @Riskalyze