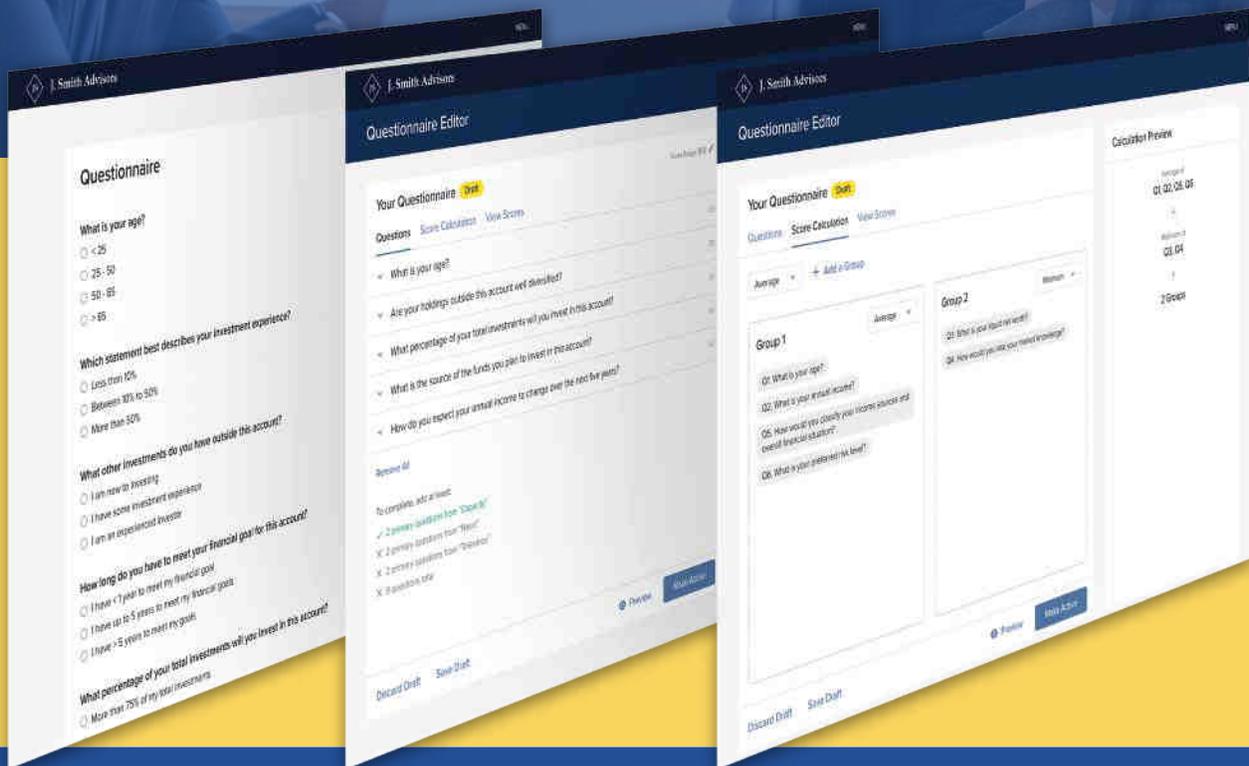




MEXEM

Invest confidently by knowing your client's risk tolerance.



Find The Right Fit

Determine the right mix of assets for your clients by assessing risk tolerance, need and capacity. Our risk profile tool monitors for changes in risk scores and reflects current information to help you make appropriate investment decisions.



Tailored to Your Practice

Get the answers that matter most with our customizable, white-branded questionnaire and flexible scoring system. Pick from over 50 questions to get exactly the information you need and configure the risk scoring to reflect how you run your practice.

A Fully Integrated Solution

Our risk scores are fully integrated with our Trader Workstation trading platform making it easy to go from asking questions to investing client assets.

Create allocation groups and profiles based on risk scores and other filters to quickly place trades or invest clients with similar risk profiles into models right in TWS.

If you use our model portfolio technology, you can assign a score range to each model and our system will warn you if a client invested in the model has a score outside the range.

John
4.5



Anna
4.2



Lucy
3.6



Eric
3.3



Matt
2.5



Manage More Than Just Money

Our platform lets you easily review clients' risk scores alongside customizable portfolio reports from our PortfolioAnalyst tool so you can manage client expectations for their future, not just their money.

Meeting Your Obligations

Our risk profile tool helps you with your fiduciary duty to determine the suitability of investments and advice for your clients whether you're an SEC or state-registered advisor.

Contact our Financial Advisor Services team to add this feature for your account.

All investments involve risks, including the possible loss of capital. www.mexem.com is a website owned and operated by MEXEM Ltd. MEXEM Ltd is a European broker regulated by CySEC, license No. 325/17.

