

Wealth Management Risk Profile

Client ID: ea1d8479...

Risk Assessment

Risk Score: 84/100

Risk Category: AGGRESSIVE

Recommended Portfolio Allocation

Stocks: 80%

Bonds: 10%

Cash: 5%

Alternatives: 5%

Key Insights

1. For an aggressive investor like yourself with a 30-year investment horizon and a focus on wealth building, we'll need to consider strategies that can help you maximize returns over the long-term.
2. We recommend allocating 80% of your portfolio to stocks, which will provide potential for higher growth and returns.
3. Regularly reviewing and rebalancing your portfolio to ensure it remains aligned with your investment goals is essential.

Recommended Next Steps

1. Schedule a follow-up meeting to discuss our recommendations in more detail and create a comprehensive investment plan tailored to your needs.
2. Research tax-efficient investing strategies to minimize tax liabilities.
3. Consider diversifying your investments across different asset classes to minimize risk and maximize returns.