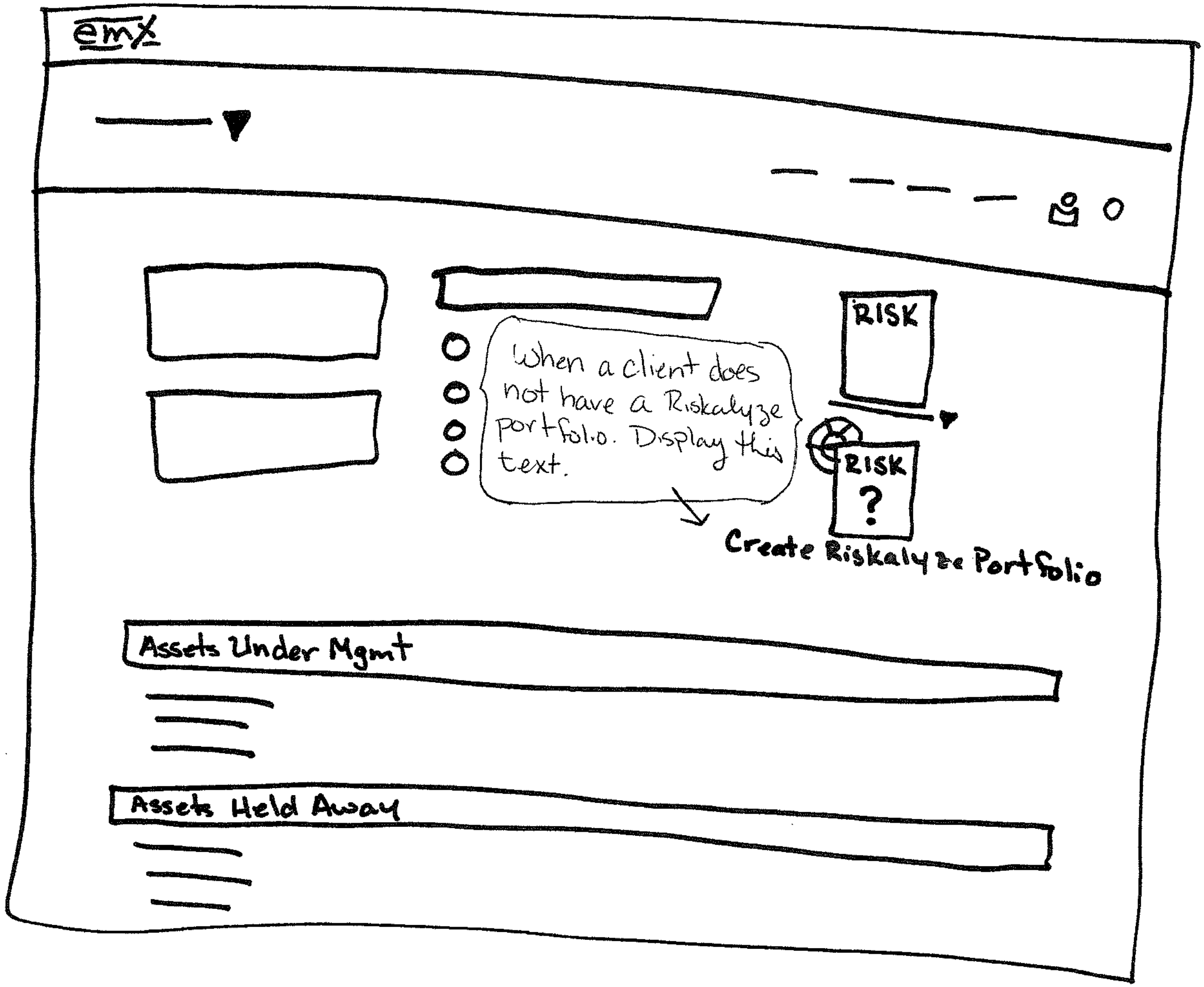
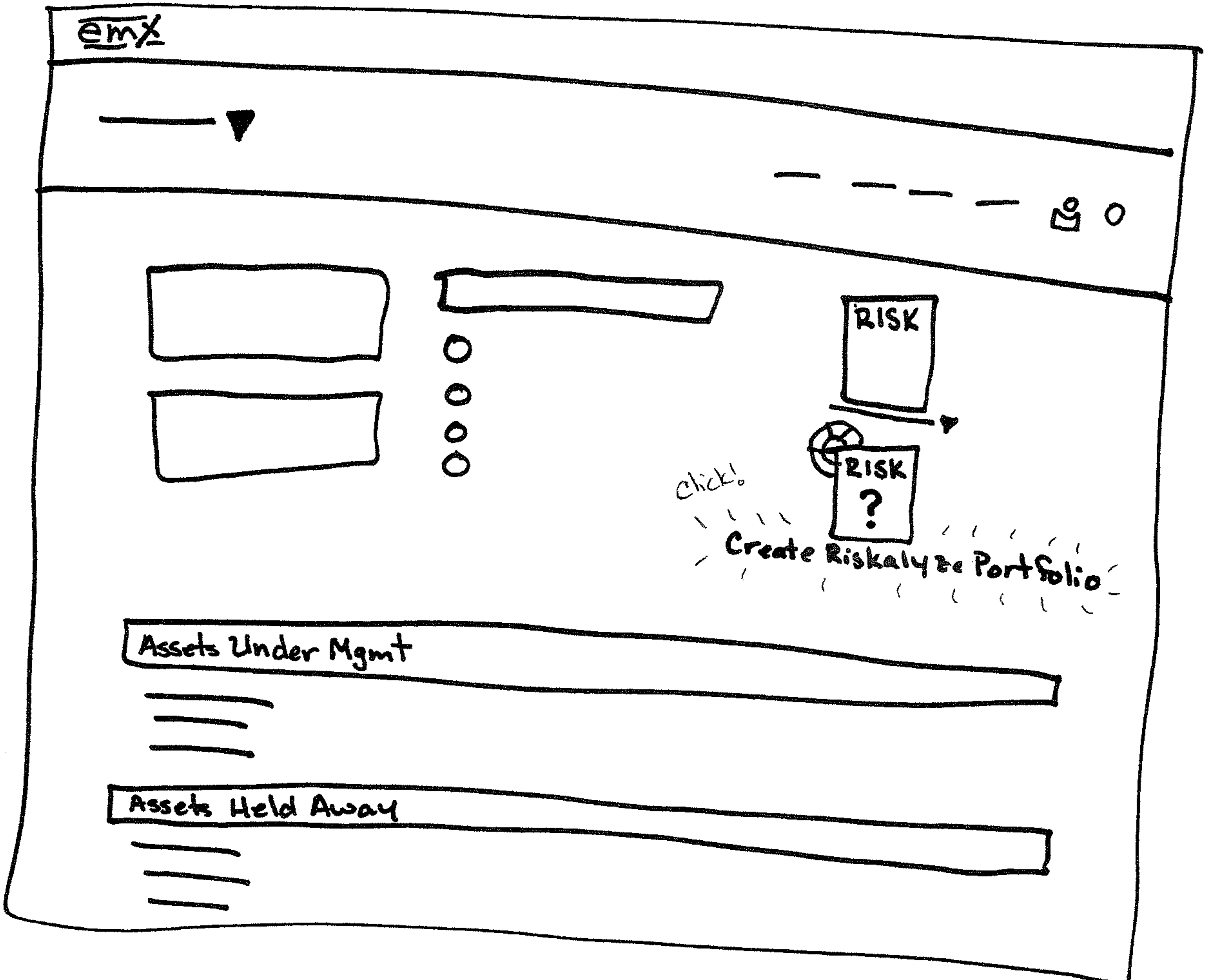
RISKALYZE
ACCOUNT SYNC

1. Multi select Modal
2. info message when we over write
   - Do we need it for "REFRESH"
3. How to show fall back /proxy
4. What to do when there is an error
5. Wording, in general

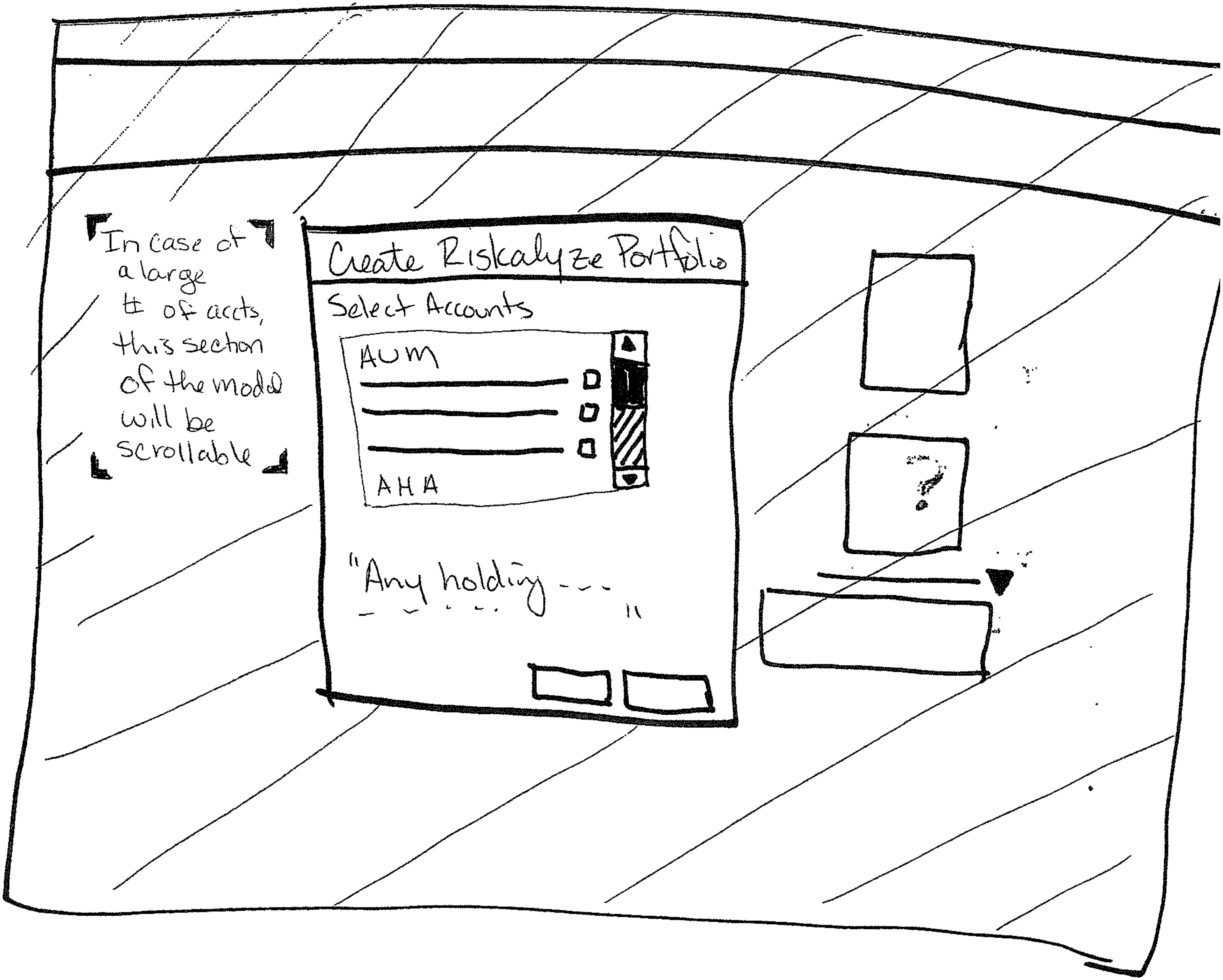
- Starting on the client overview
- Client has been linked to Riskalyze

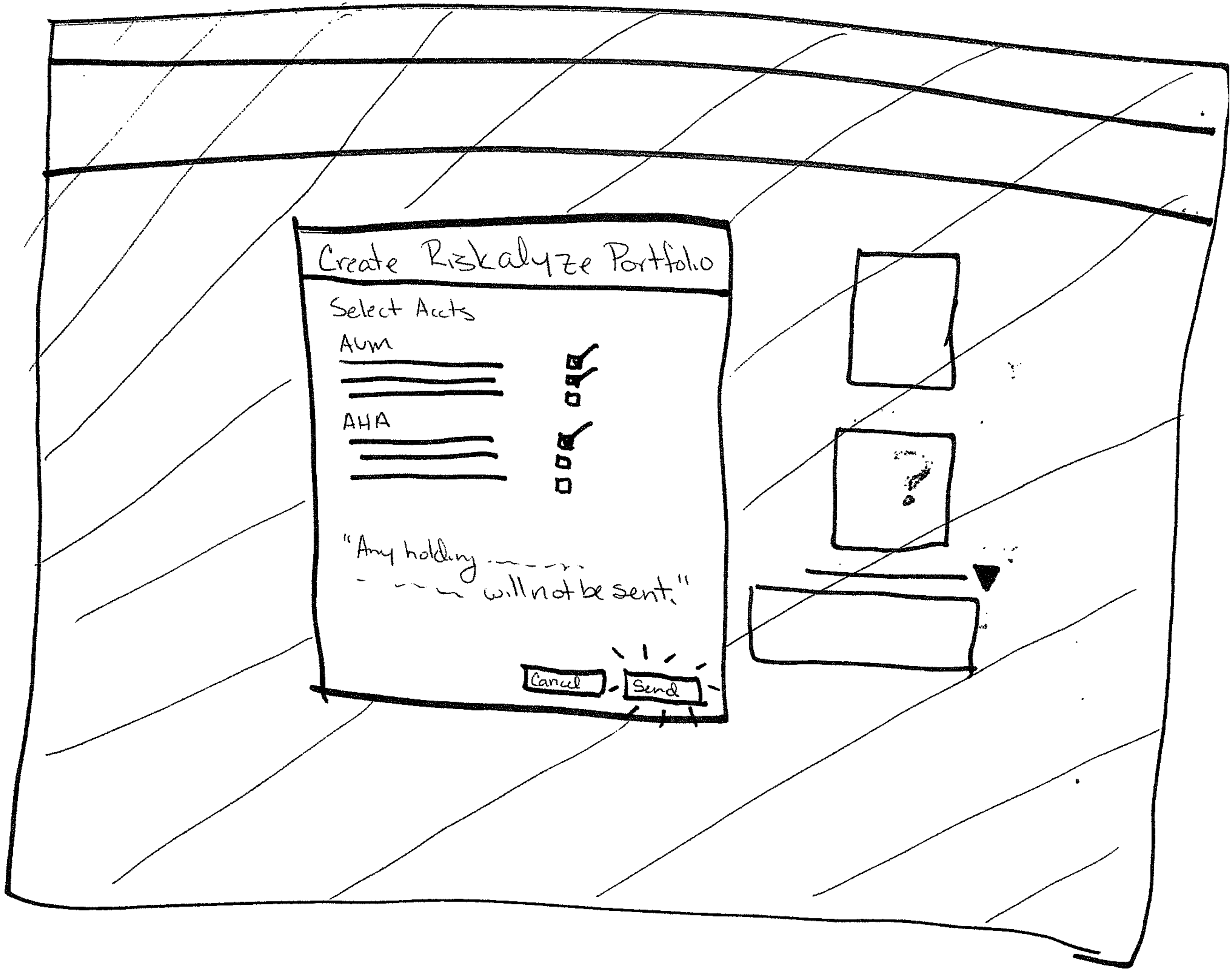


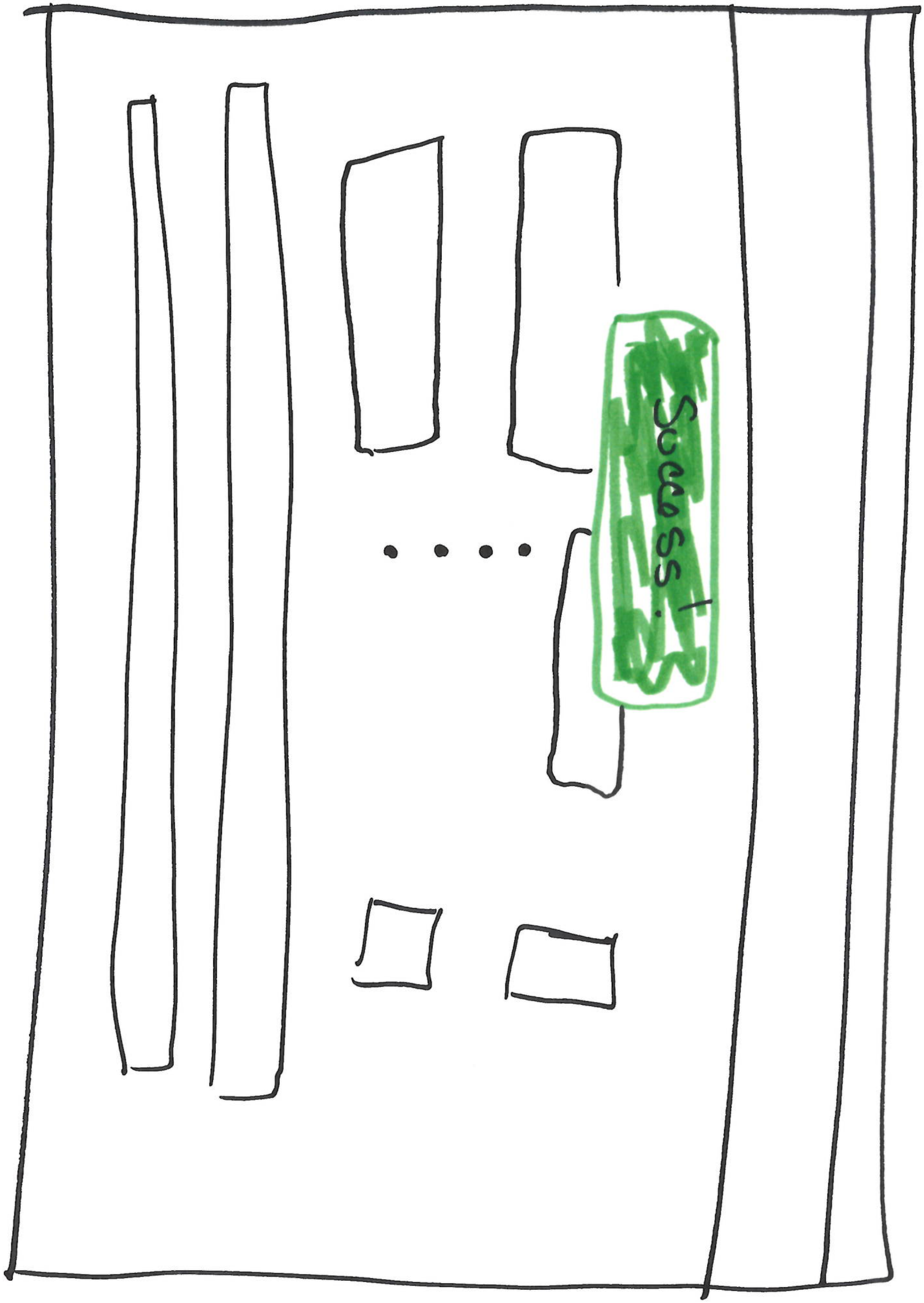
emx
RISK
When a client does not have a Riskalyze portfolio. Display this text.
RISK
?
Create Riskalyze Portfolio
Assets Under Mgmt
Assets Held Away

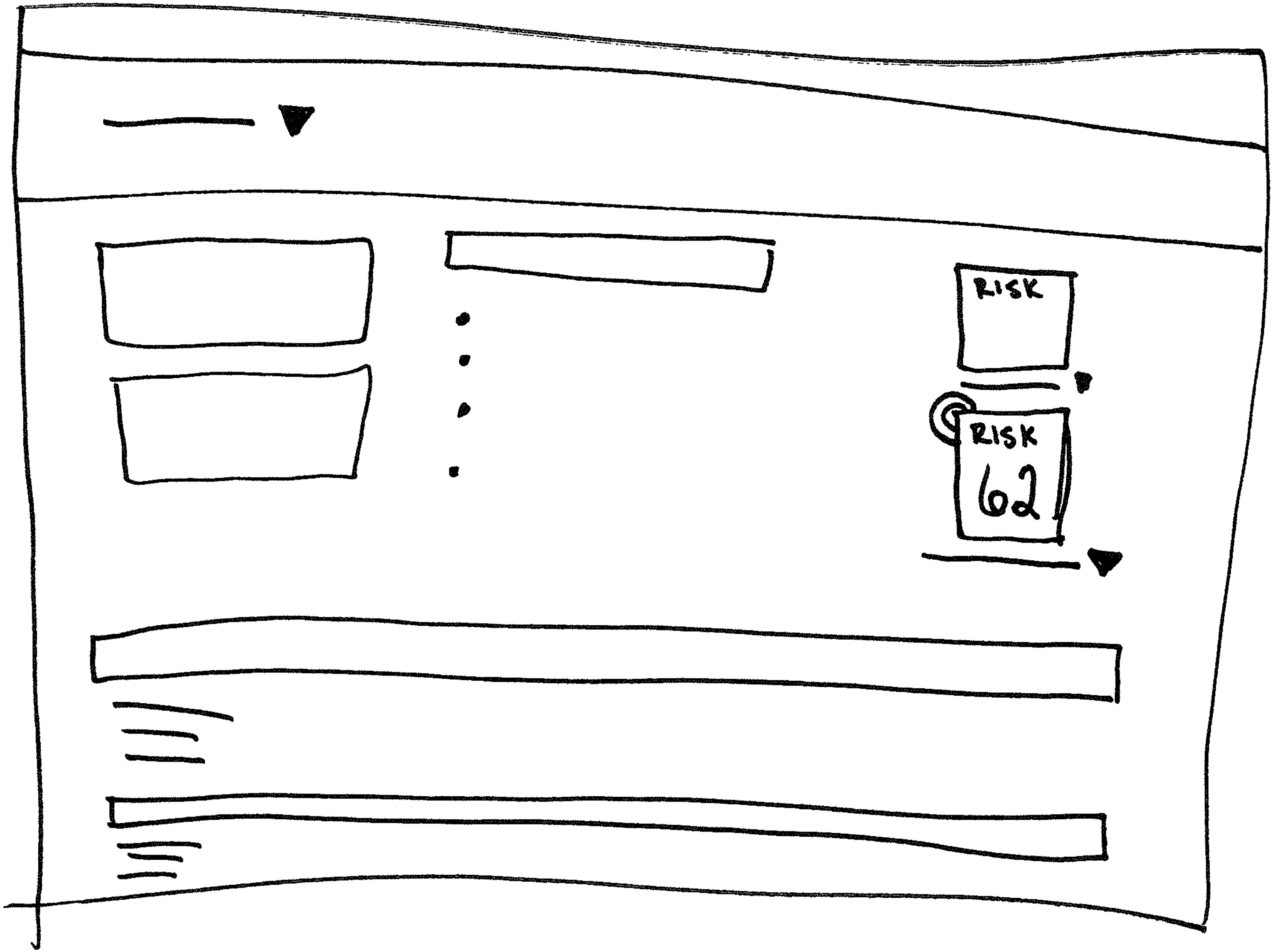

emx
RISK
RISK
?
click!
Create Riskalyze Portfolio
Assets Under Mgmt
Assets Held Away

Create Riskalyze Portfolio
Select Accts
AUM
AHA
*
"Any holding ...
... will not be sent."
Cancel
Send
Accts in same order as on Overview.
Include $? ✓
Select ALL? ✓
Deselect ALL? ✓


In case of a large # of accts, this section of the modal will be scrollable
Create Riskalyze Portfolio
Select Accounts
AUM
AHA
"Any holding ...
... "


Create Riskalyze Portfolio
Select Accts
AUM
AHA
"Any holding
will not be sent."
Cancel
Send

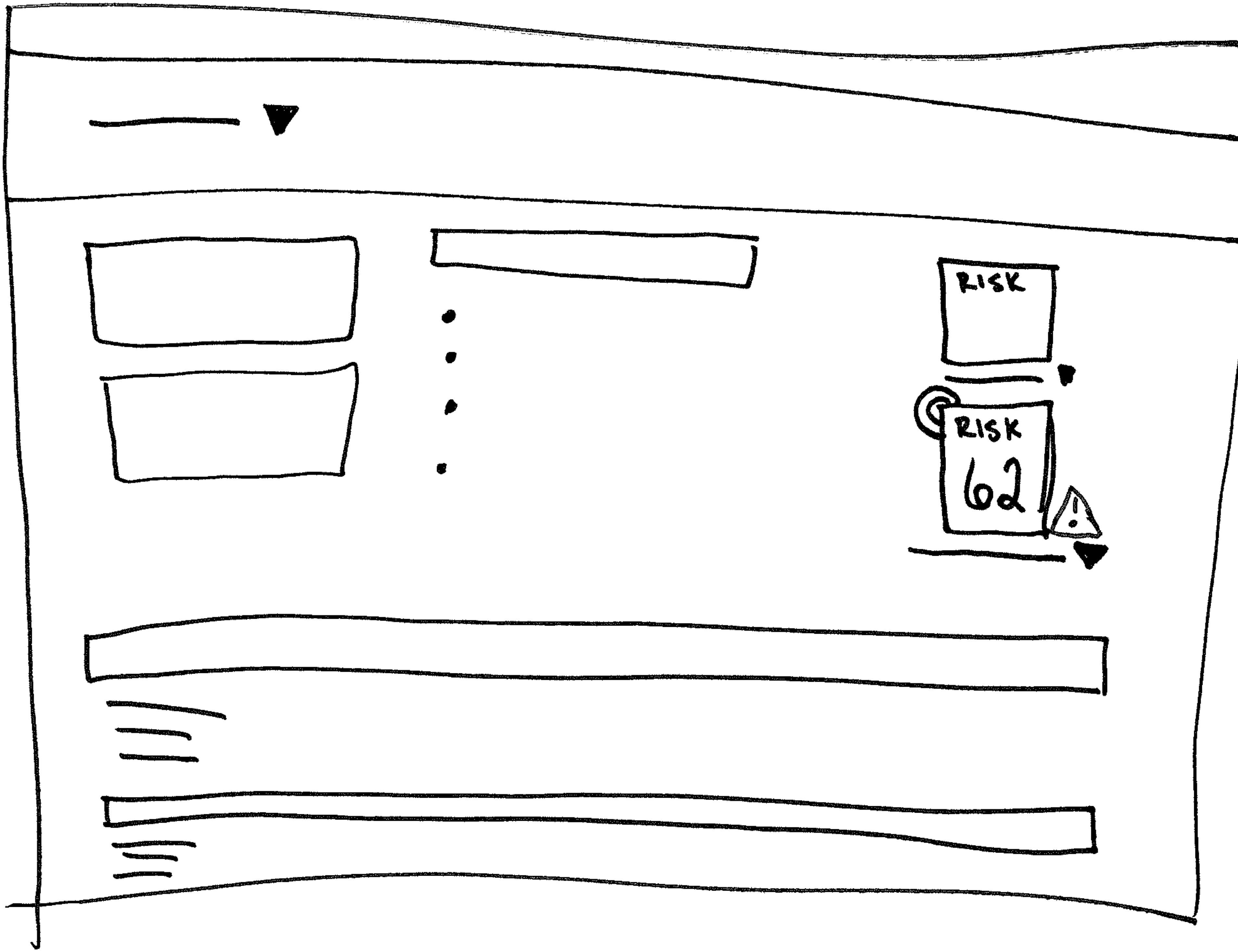

Success!

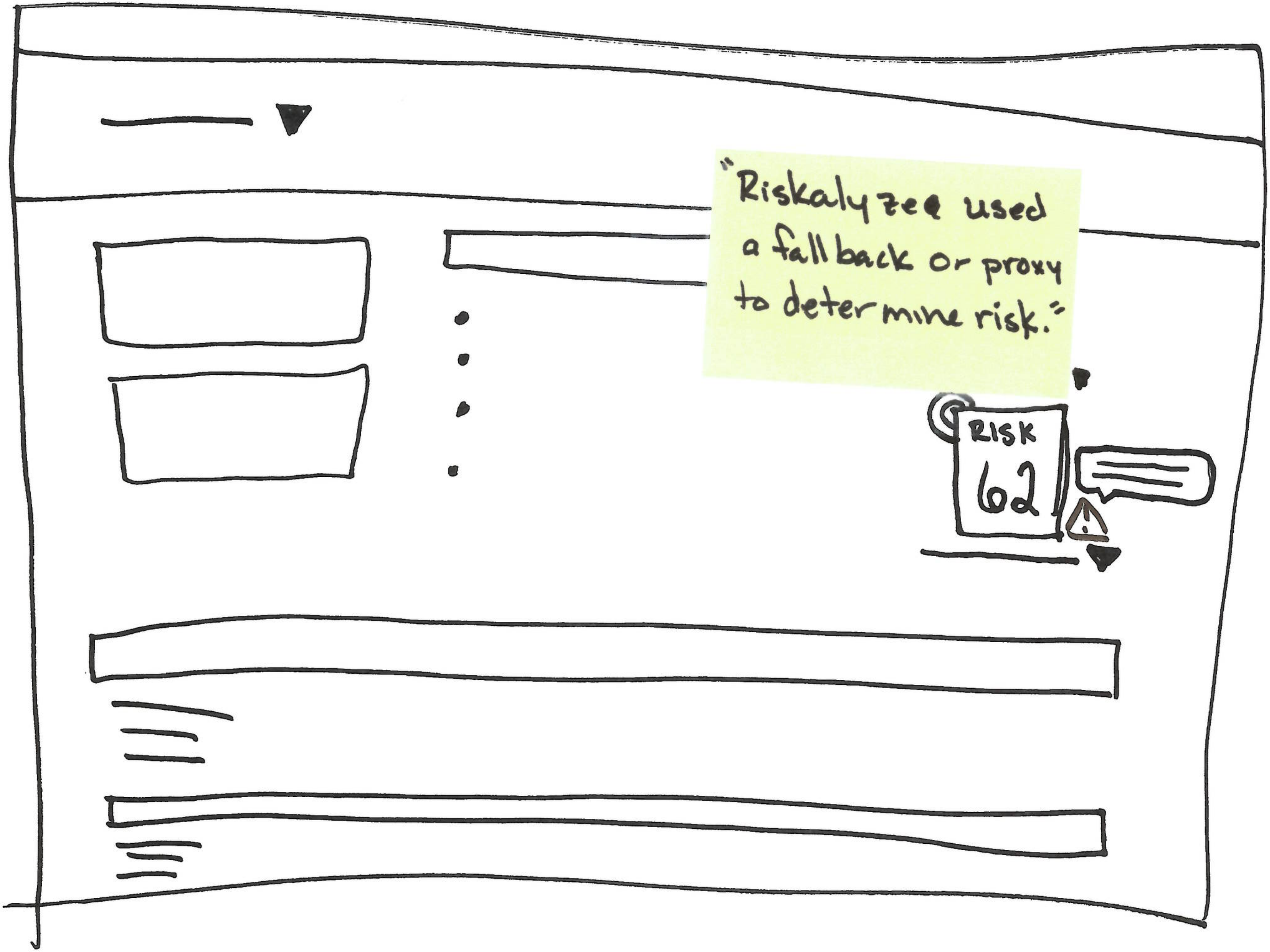

RISK
RISK
62

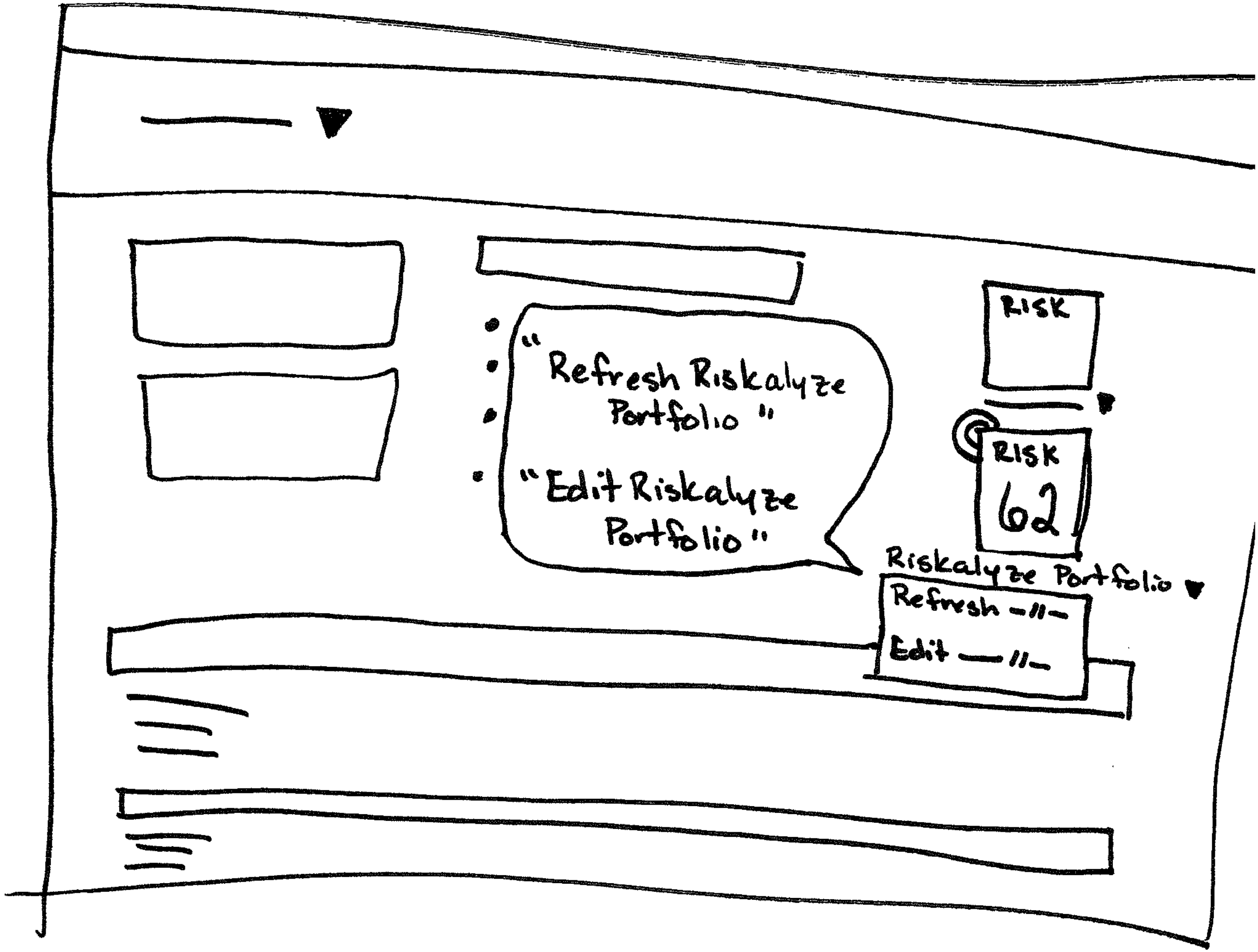
When Riskalyze uses a fall back or proxy asset to determine risk...

This is still an open item.

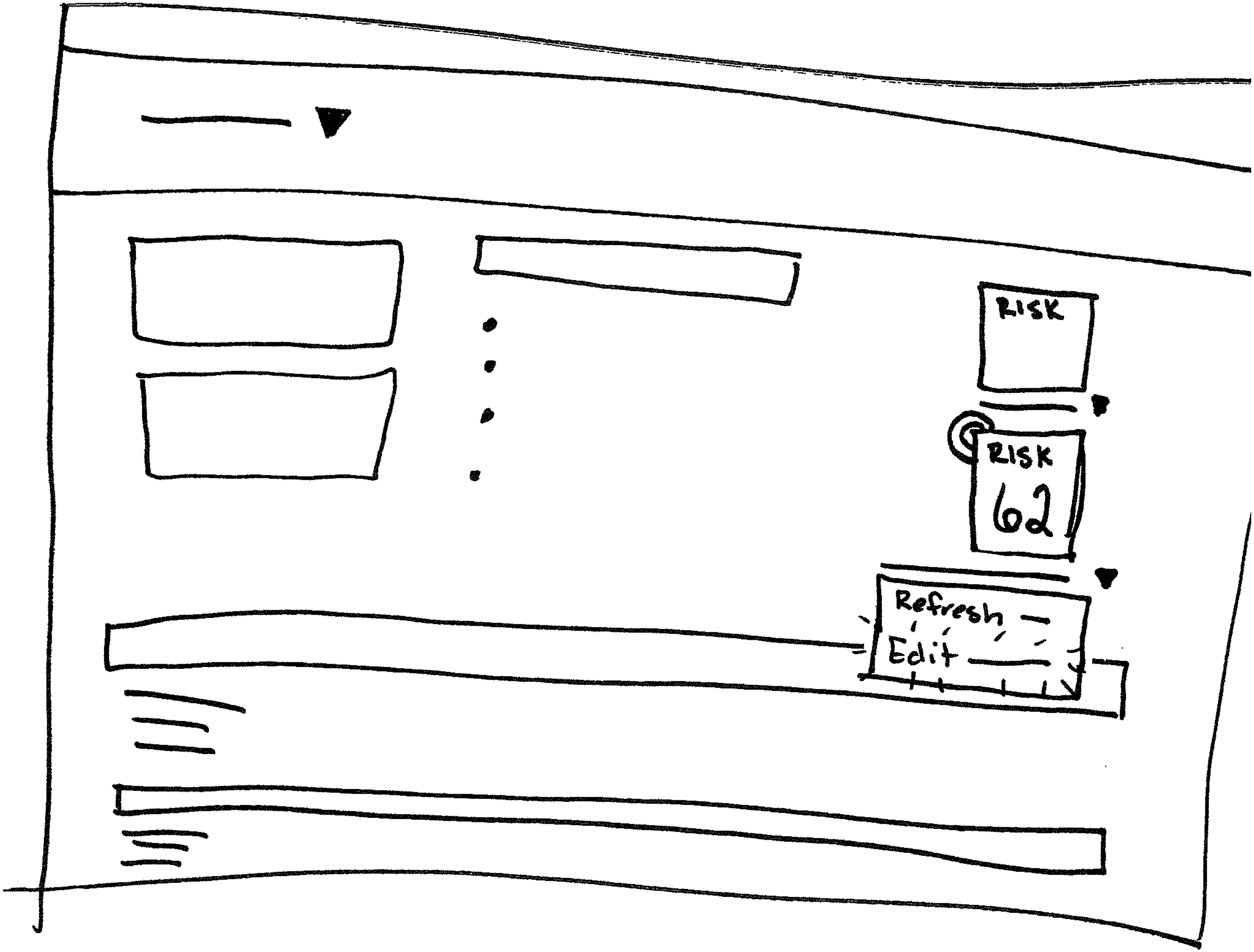
One idea, show icon near the portfolio's risk number...


RISK
RISK
62


"Riskalyze used a fallback or proxy to determine risk."
RISK
62


"Refresh Riskalyze Portfolio"
"Edit Riskalyze Portfolio"
RISK
RISK
62
Riskalyze Portfolio
Refresh -//-
Edit —//-

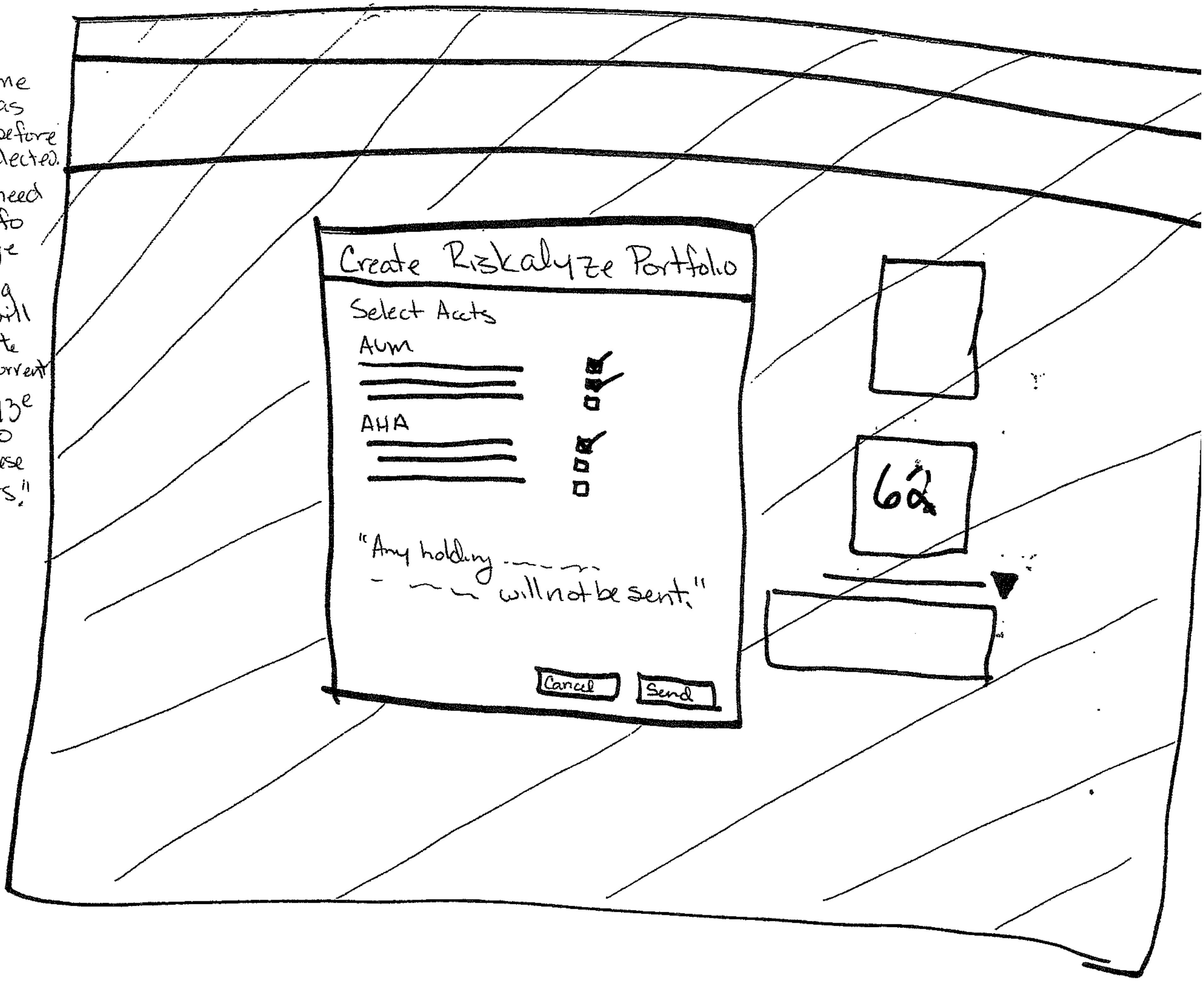

Clicking Refresh sends same accts as before to Riskalyze info?
RISK
RISK
62
Refresh
Edit

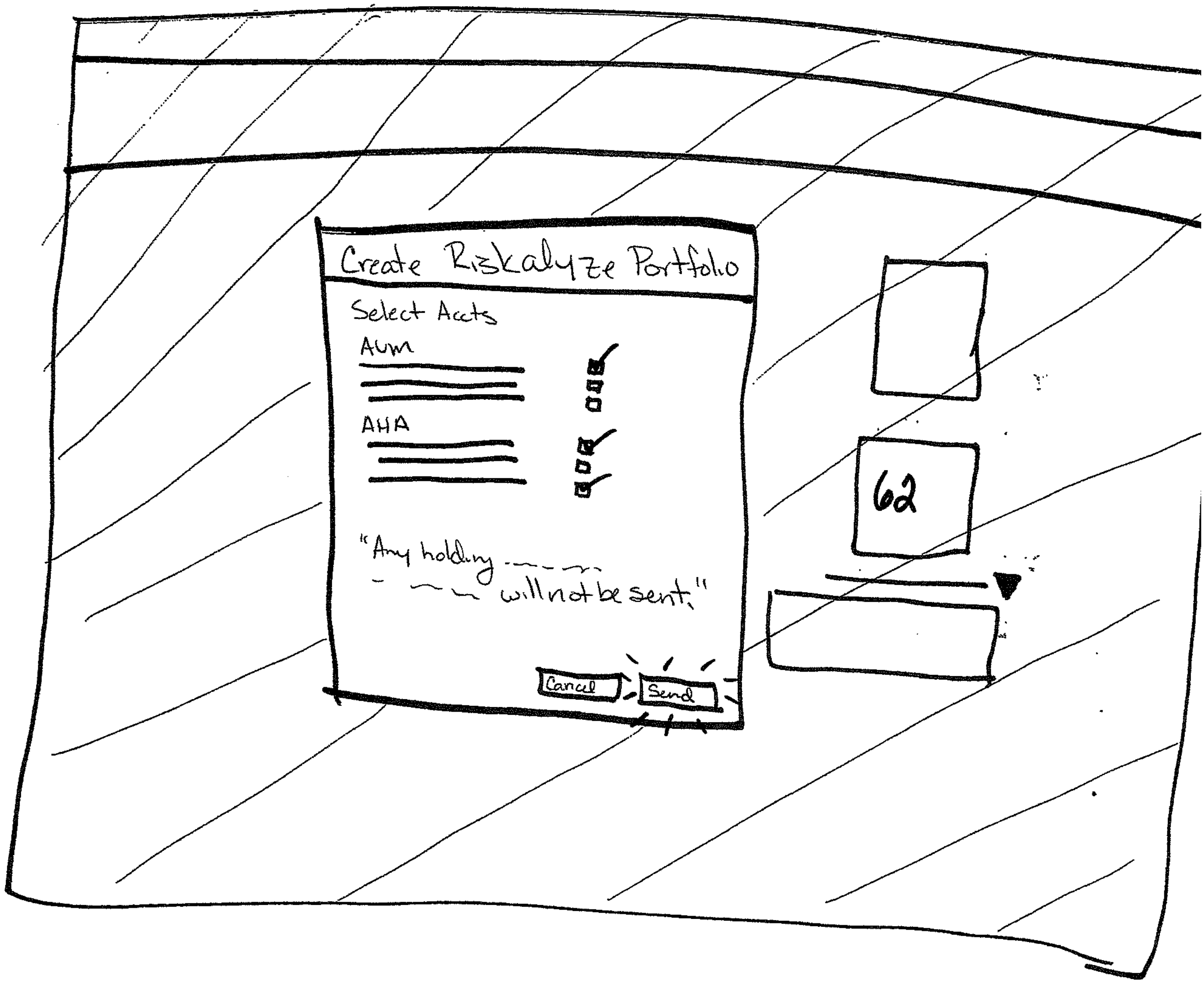

RISK
RISK
62
Refresh
Edit

The same accts as Send before are selected.

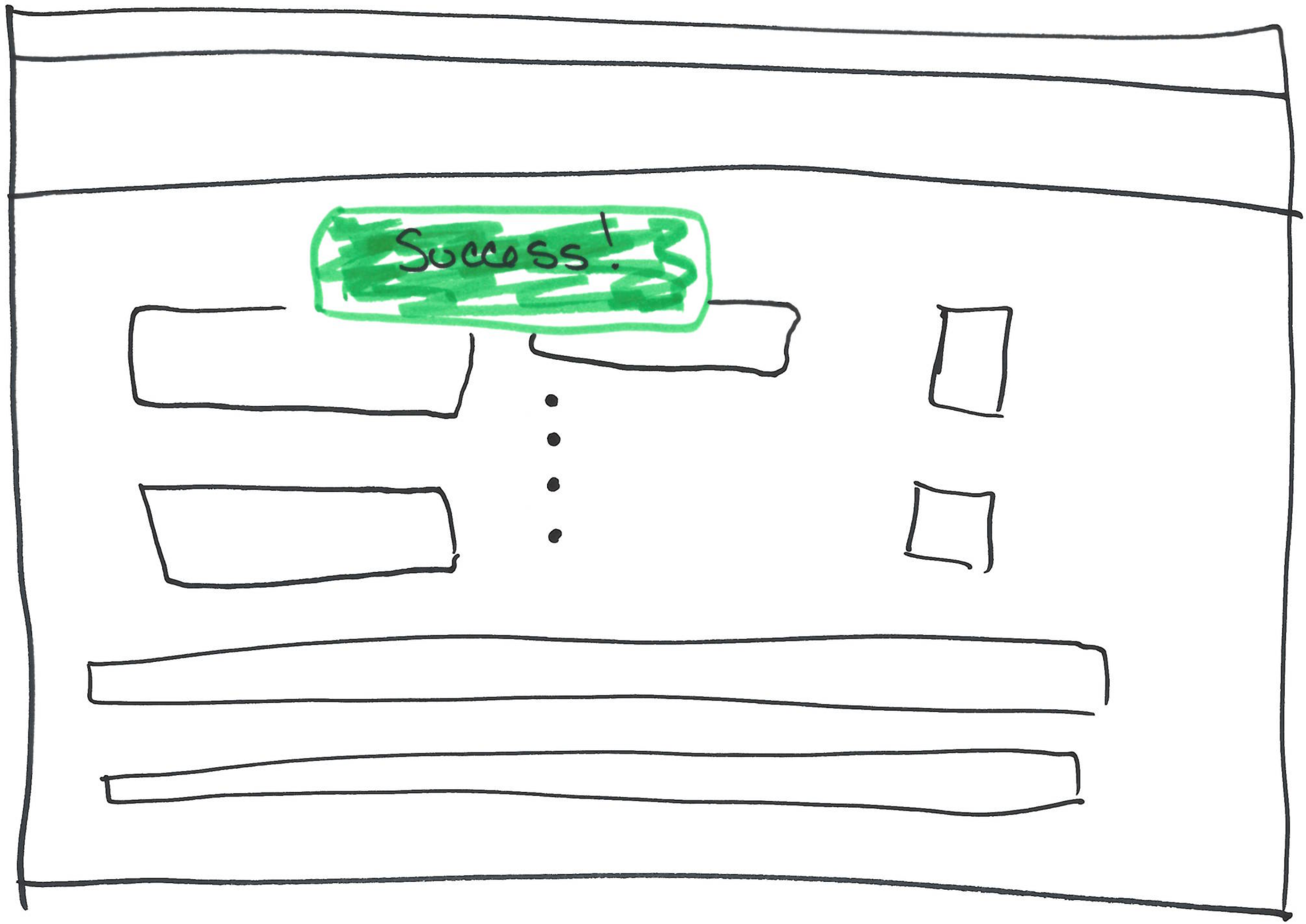
Do we need an info message

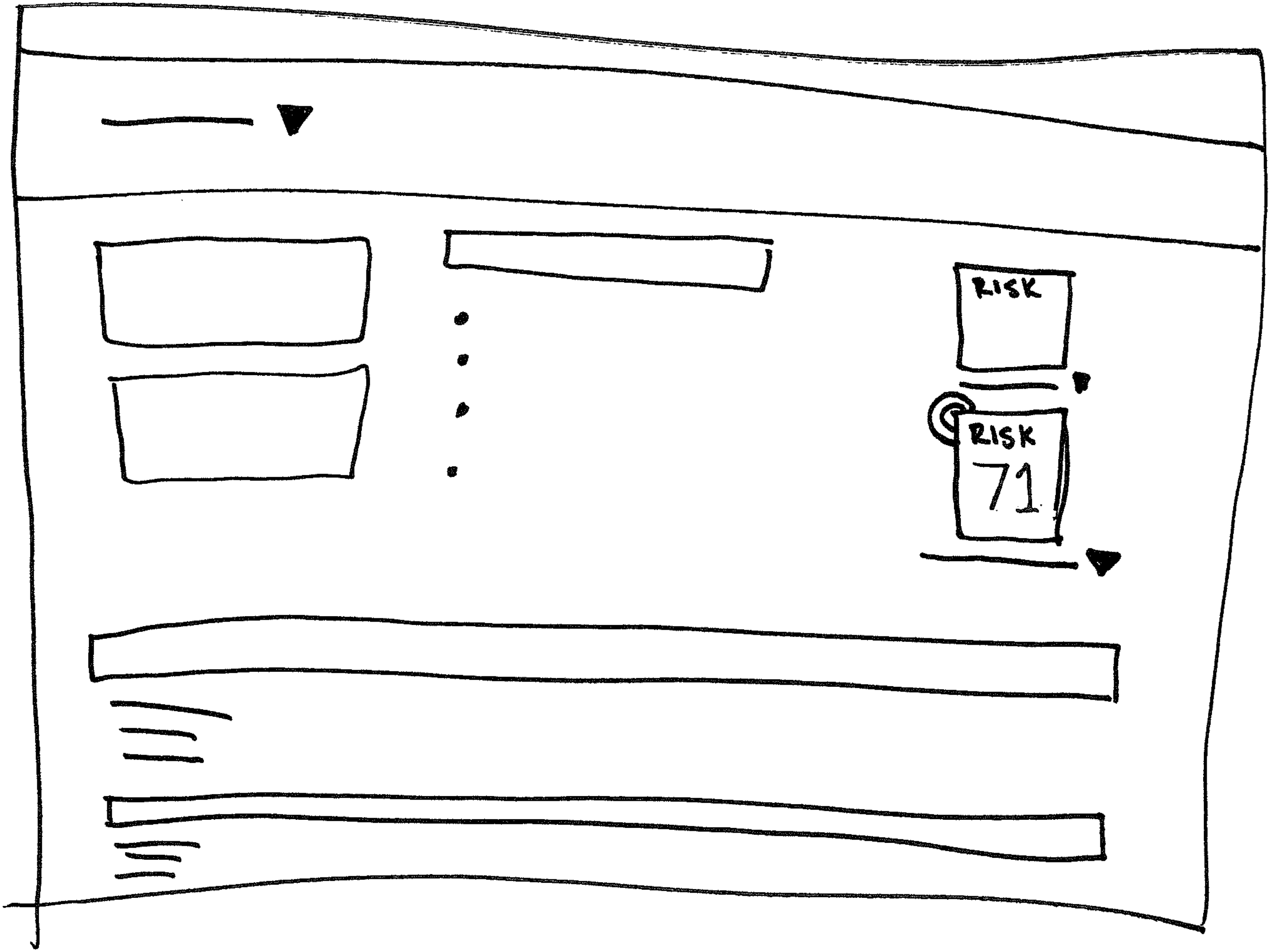
"Hitting Send will overwrite your current Riskalyze Portfolio with these accounts."





Create Riskalyze Portfolio
Select Accts
AUM
AHA
"Any holding
will not be sent."
Cancel
Send
62


Success!


RISK
RISK
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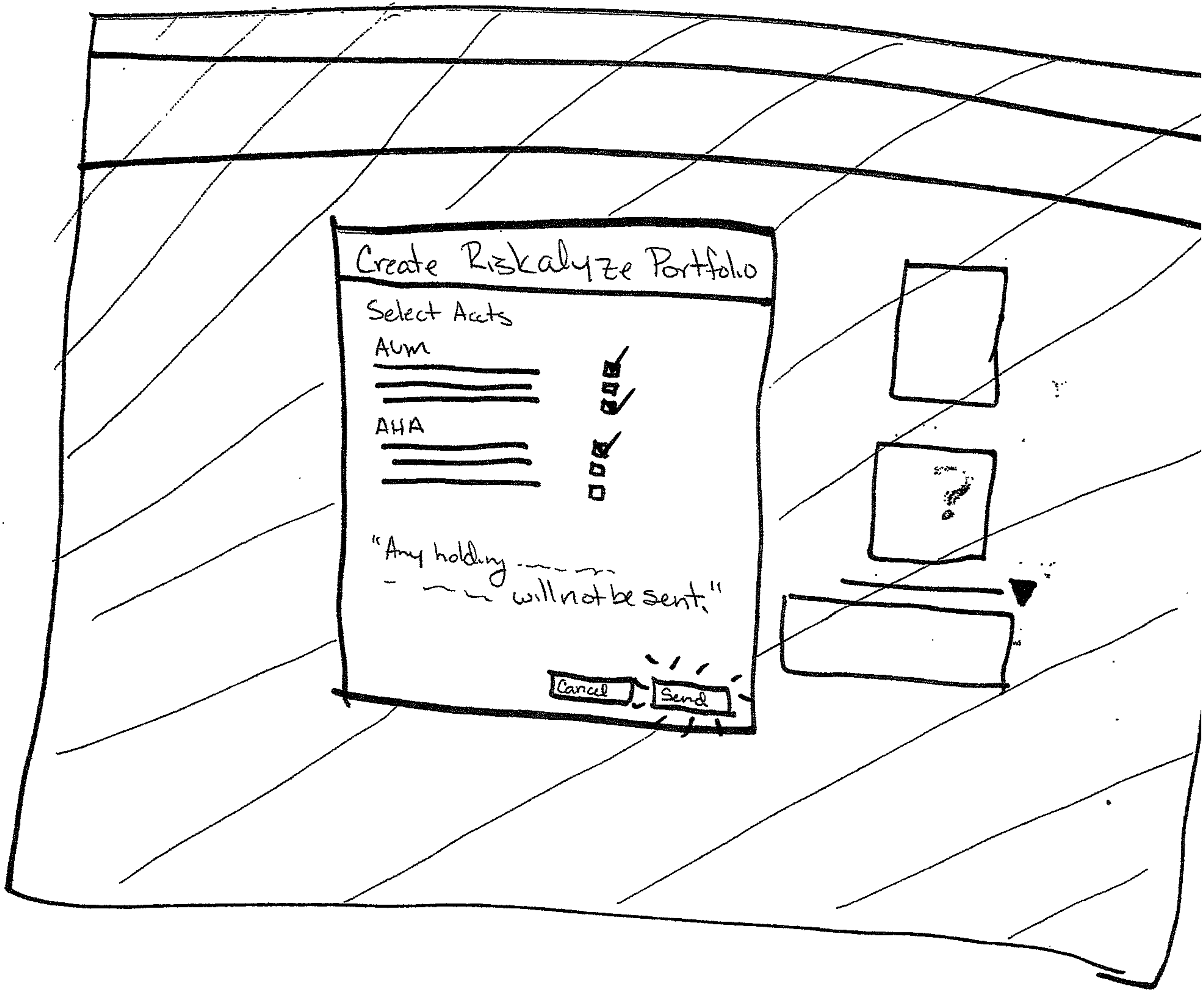
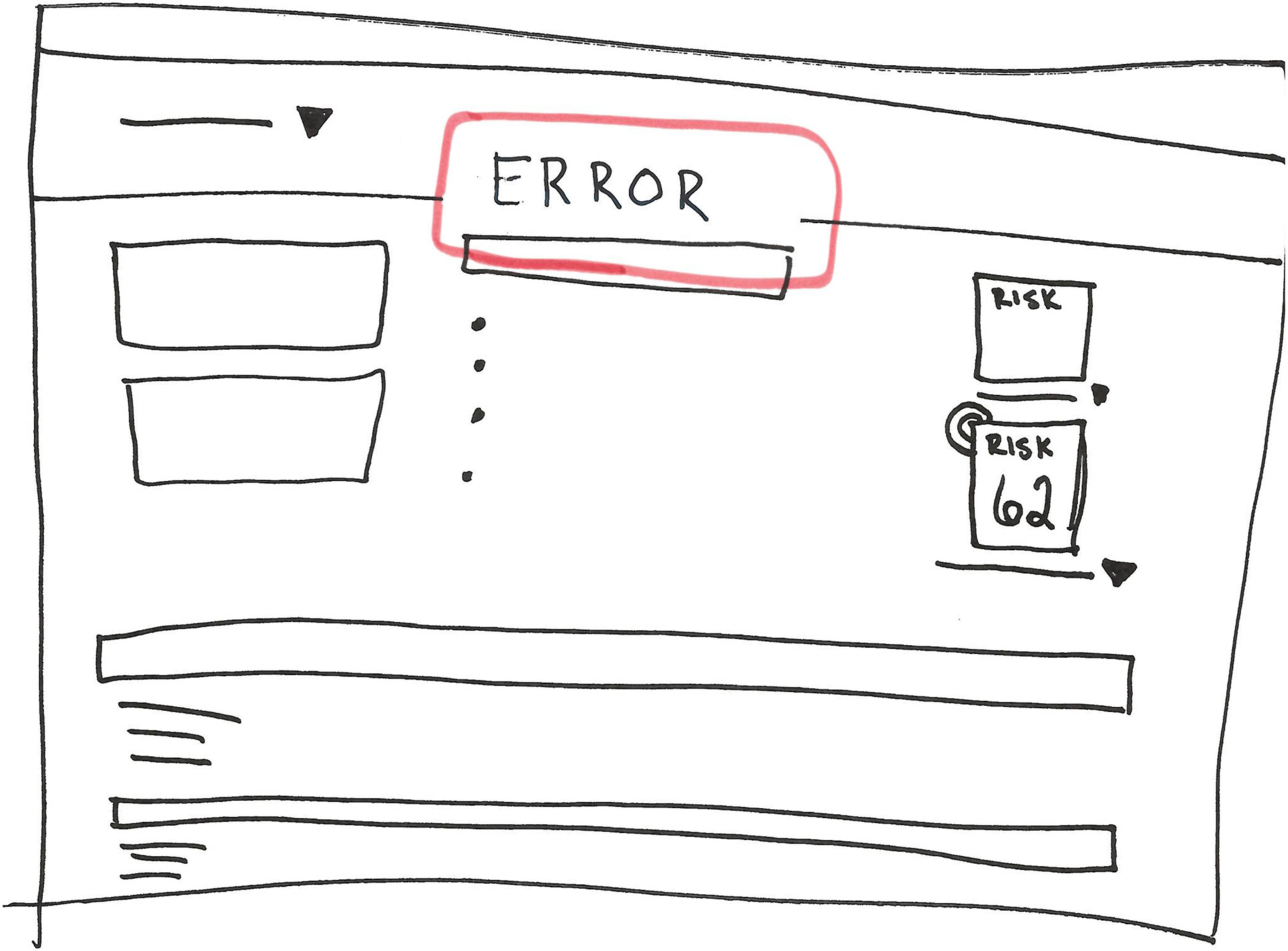
What happens if there is an error returned from Riskalyze?

* Some times, via the Riskalyze UI, we see an error... but everything seems to work!

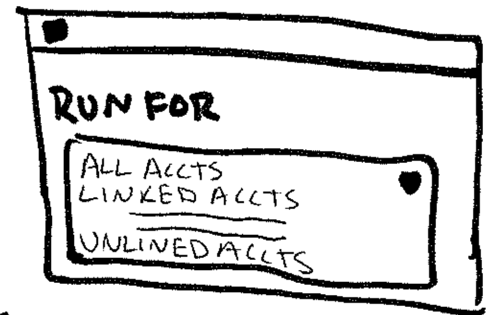

Create Riskalyze Portfolio
Select Accts
AUM
AHA
"Any holding
will not be sent."
Cancel
Send


ERROR
RISK
RISK
62

OTHER
MULTISELECT
IDEAS !

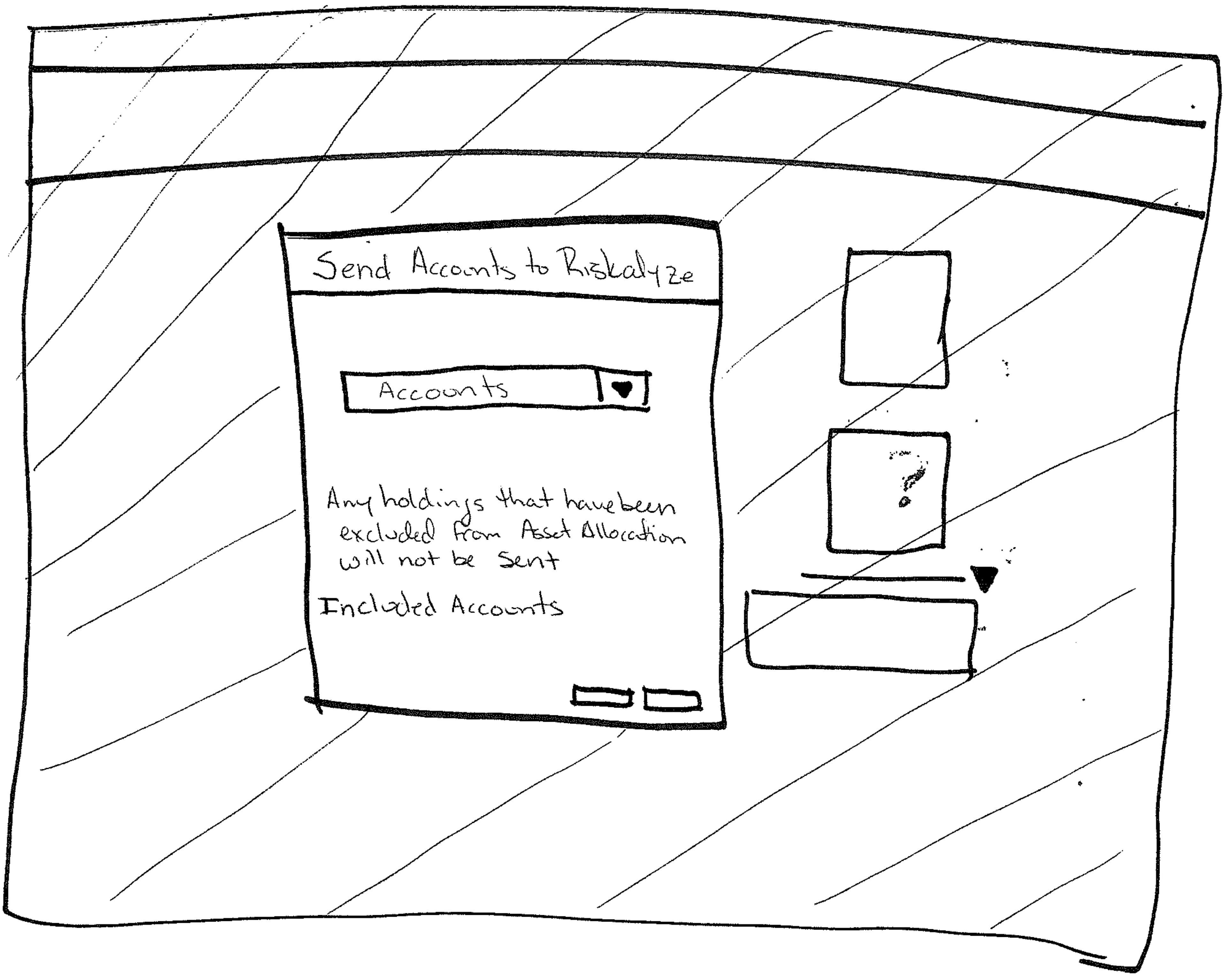
EXISTING PATTERNS IN SELECT

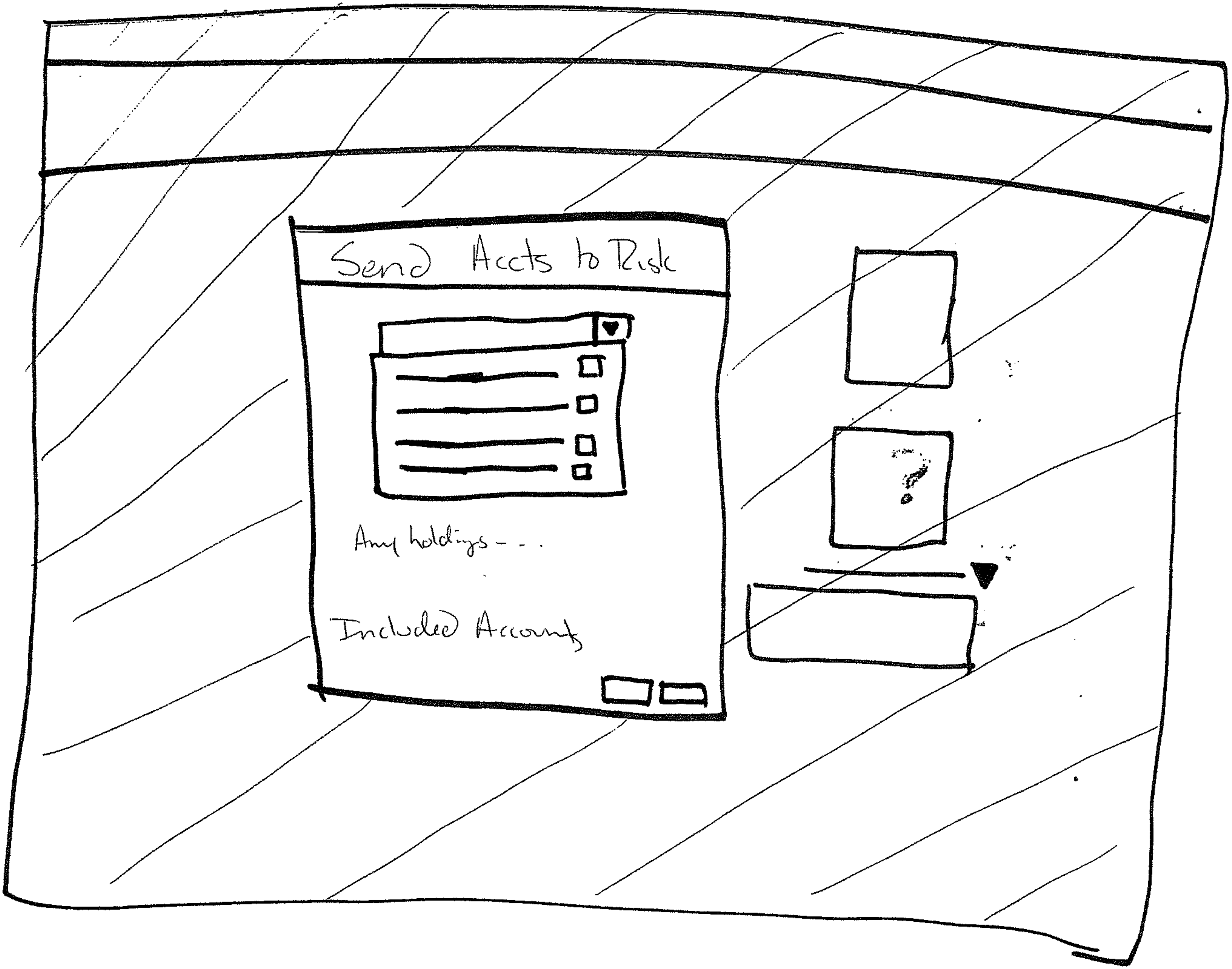
Orion: Either 1 account or ALL Accounts.

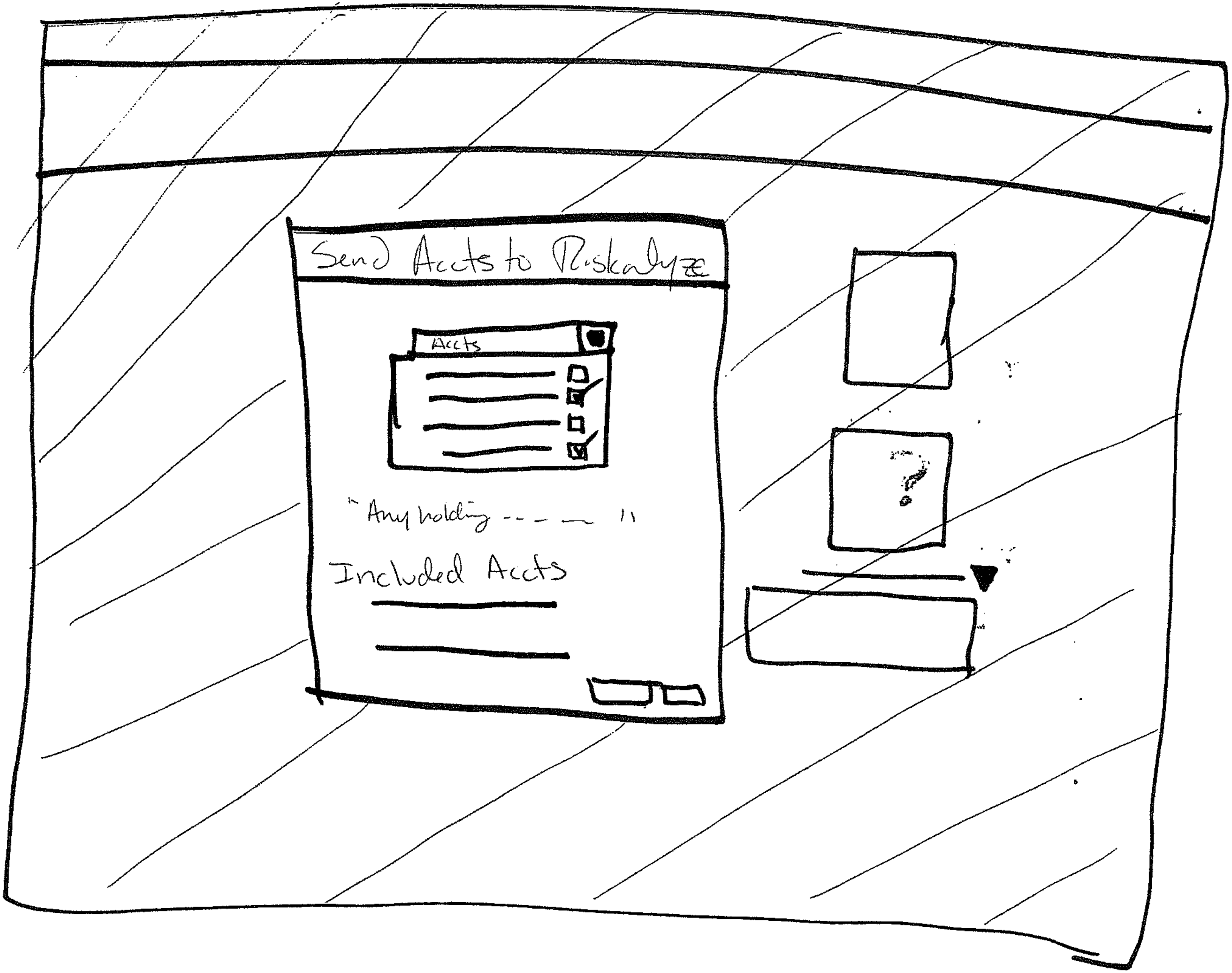


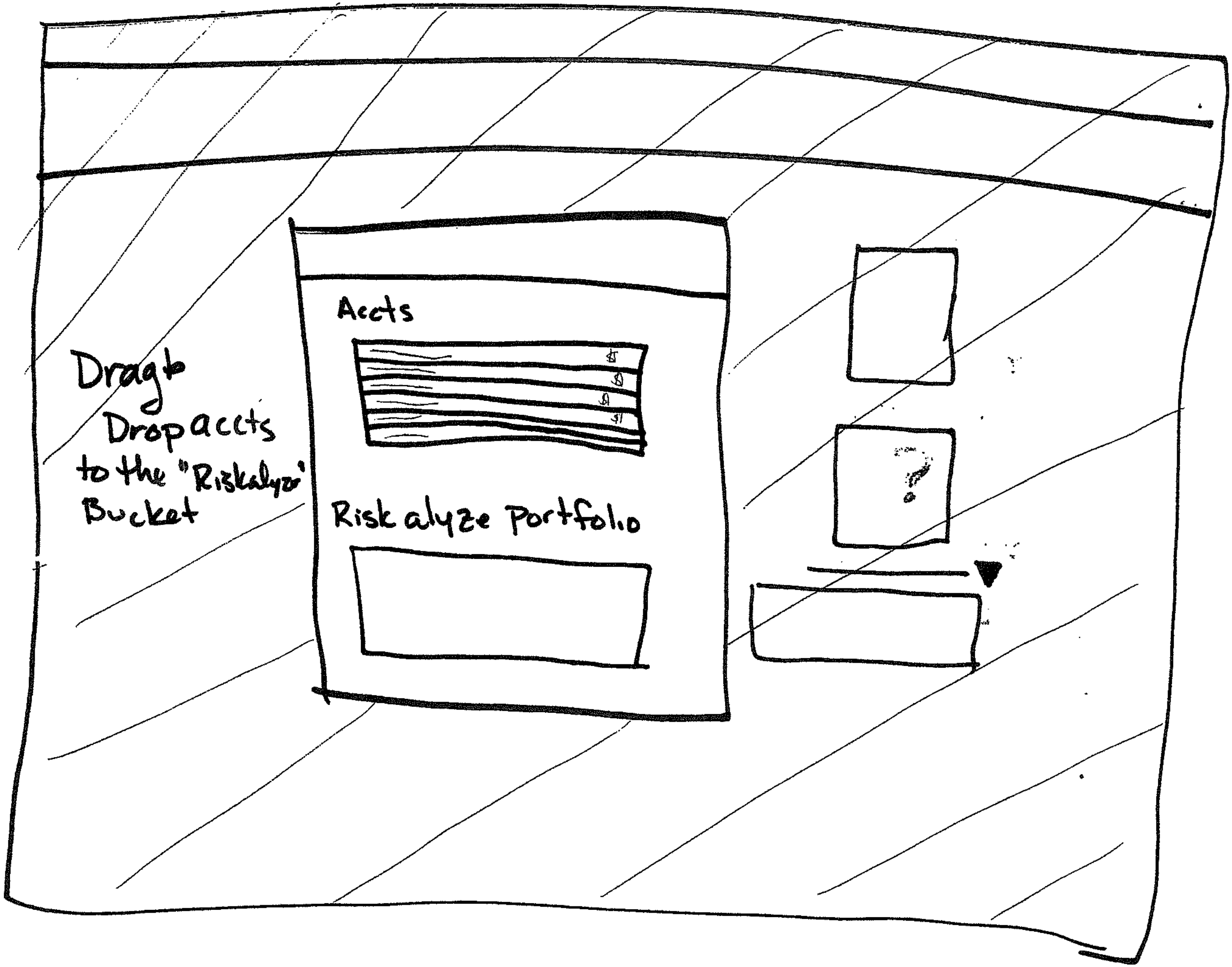
Albridgi: Select 1 of their "portfolios" not directly related to eMoney accounts

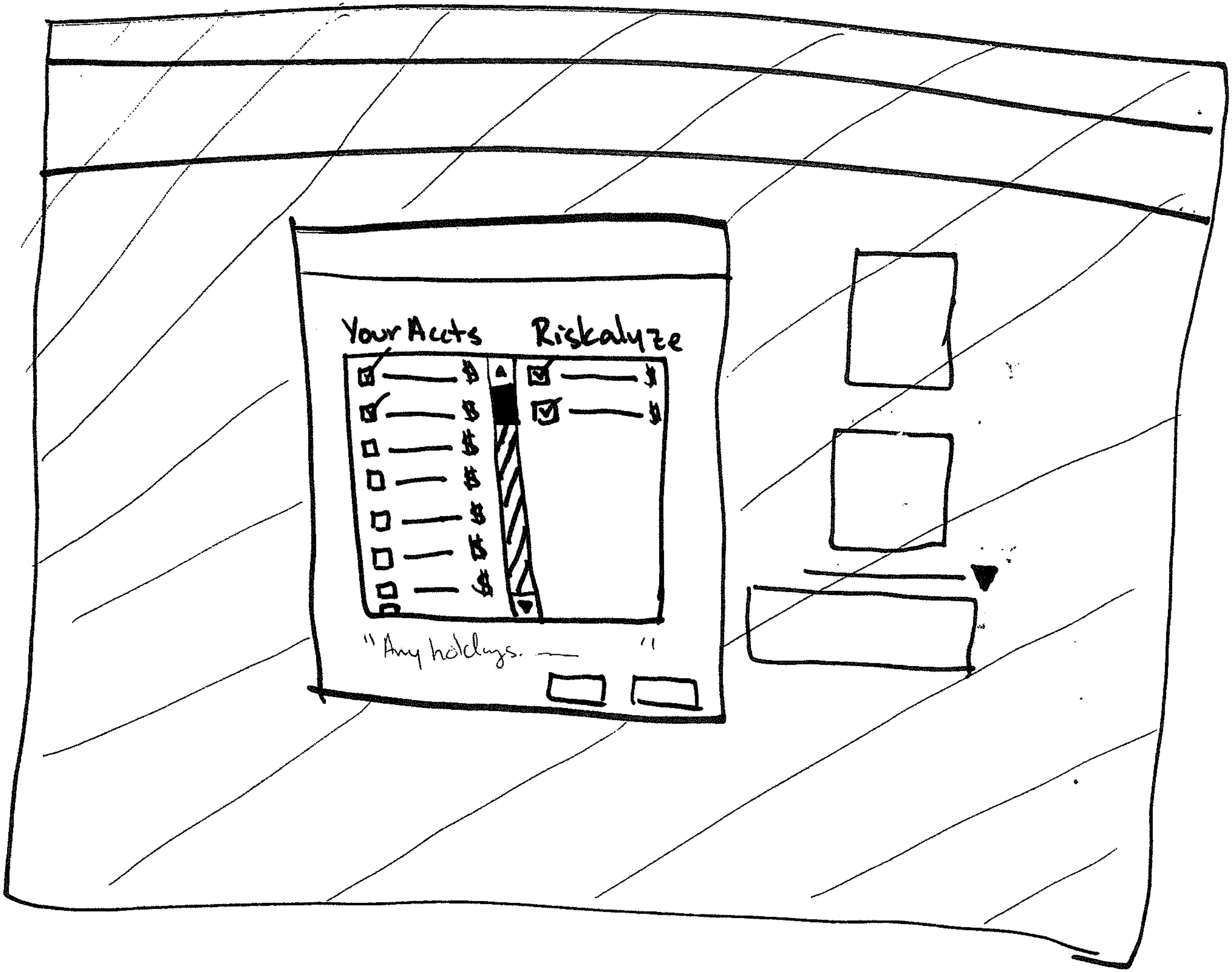
Morningstar: Allows multi select, but we've received feedback that it is not intuitive → users don't know what to search!


Send Accounts to Riskalyze
Accounts
Any holdings that have been excluded from Asset Allocation will not be Sent
Included Accounts


Send Accts to Risk
Any holdings - - -
Included Accounts


Send Accts to Riskalyze
Accts
"Any holding ----- "
Included Accts
?


Drag & Drop accts to the "Riskalyze" Bucket
Accts
Riskalyze Portfolio


Your Accts
Riskalyze
$
"Any holdings. __ "