



# SIMPLIFIED PROPOSAL GENERATION FOR **WELL-DIVERSIFIED PORTFOLIOS**

Our clear, step-by-step process for proposal generation helps you understand investor expectations, identify and pair relevant investment options, and communicate recommendations to clients.

**Create Well-Diversified Portfolios with Confidence. Here's How:**



Access to a proposal system that combines risk and market participation assessments directly within the portfolio builder empowers our advisors to build custom, well-diversified portfolios with confidence.



To learn more, contact us today:  
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