



Dear Friend,

I say “friend” because that’s what I’ve become with so many of the amazing advisors we have the privilege to serve. I believe that what you do is among the noble of pursuits. As I said at our first-ever Fearless Investing Summit, “you are the unsung heroes of a thousand dreams that come true...you are the champions of a thousand stories with a happy ending.”

So thank you for the privilege of being a small part of your success in 2017.

Every year in our history as a company, I think “surely we can’t go any faster than we did this year,” but every year seems to surprise us. I guess that’s what happens when your growth is fueled by a movement to empower fearless investing — a movement that is now over 20,000 advisors strong.

Here are just a few of the things we accomplished together this past year.

## Autopilot

We announced in February, launched Autopilot in June, and the excitement among advisors has been white hot so far. After spending years watching advisors engage with their clients around the Risk Number, and then make portfolio allocation decisions around the Risk Number, it’s thrilling to watch them start to implement their portfolio decisions and keep accounts on track the same way.

So many Riskalyze team members, early customers and great partners played huge roles in getting the Autopilot platform up to speed. We can't wait to see how it supercharges fearless investing and drives growth in your business in 2018.

## Over 200 Riskalyzers

It was only four years ago that I leased office space for 25 people and thought "wow, this should be able to handle us for a long, long time." 51 weeks later, we moved out of that space, and this past year has been our biggest growth spurt yet, going from 90 to 210 Riskalyzers excited about serving you and innovating to make your business better.

This past year, we doubled our square footage by opening a second site in Auburn, California and now have about 135 employees in the city (believe it or not, we're told we're now the largest employer in the limits of our 30,000-person city). We have 65 amazing Riskalyzers in Atlanta all moved into a new 24,000 square foot space that will give us lots of room to grow there.

I love going to work every day with some of the smartest people in the world, who spend their days thinking about how to make the world's best advisors look even more brilliant than they already are.

## Fearless Investing Summit

When our marketing and communications team pitched holding our own conference for the first time this year, I knew it would be a huge undertaking. Fortunately, we found the guy for the job. Dan Bolton joined us as Director of Conferences and Events, and after coordinating logistics for the 90-some events that Riskalyzers speak or exhibit at every year, he planned and executed an epic Fearless Investing Summit that 425 of our advisors absolutely loved.

Dan has a tall order to figure out how to top that with Summit 2018, but we're well on our way and we hope to see you there!

Also, we know that not everyone can make it to Summit. After all, we only have room for 600 of the 20,000+ advisors we serve. That's why we're working on a series of regional events as well. If you're interested in attending an event a little bit closer to home, please sign up here and we'll do our best to get you an invite if we're able to bring our tour to your city.

## Challenges

The year wouldn't be complete without some challenges. Going from 90 to 210 Riskalizers in one year has created some growing pains. Our sales team has called a few existing customers this year. Our support team did a great job keeping the balls in the air as we scaled up to 1,000 calls, emails and chats every week, but I'm sure we dropped one or two.

All I can say is — our intention every day is to bring a moment of delight to the advisors we're privileged to serve. We're not perfect (yet), but thank you for sticking by us and always giving us another chance to do better. And if one of those growing pains is happening to you and you think I should know, just drop me a line any time at [aklein@riskalyze.com](mailto:aklein@riskalyze.com). Our objective is perfection, and I'm all ears whenever we fall short — I'll do my best to fix it.

## What's Next?

We've got a lot to come in 2018 — the launch of Riskalyze Retirement Solutions, Scenarios, Stats, a host of improvements to the Autopilot platform, and an incredible product roadmap that I can't spill the beans on just yet.

We're grateful to have the chance to share that journey with you. Thank you for being the heart and soul that powers the Fearless Investing Movement.

Best,

A handwritten signature in black ink that reads "Aaron". The signature is fluid and cursive, with a long horizontal stroke at the end.

Aaron Klein  
Riskalyze CEO