



News, Insights, and Disruptive Thinking from RiskPro WealthTech Visionaries

Behind
the
SHIELD

THE RISKPRO INTEGRATION WITH ENVESTNET IS COMPLETE!

This past November, you learned of an integration that would be available to thousands of Envestnet Enterprise customers in early 2021....

Well, it happened!

RiskPro has officially launched our “all-in-one” risk profiling, portfolio construction, and surveillance technology on the Envestnet platform and we are open for business.

[The integration](#) is finished and Envestnet enterprise-customers now have full access to the experience and comfort of using RiskPro to create Perpetual Suitability™.

Because we serve as the universal translator of risk, there is now a simple and common language that can be used by all parties involved with a client account, from start to finish.

Our all-seeing, data-driven surveillance engine engages to uncover and mitigate possible risk in every account it surveils with a [proven track record](#).

RiskPro guides you and keeps a complete record of the enhanced process of:

- Setting an Investor’s Personal Risk Budget
- Setting Investor Expectations
- Constructing the Investment Portfolio
- Automatic Monitoring of Models and Accounts Daily

Once the account has traded, a daily surveillance feed allows enterprise back offices and advisors to monitor every account coming through the RiskPro engine. Perpetual Suitability™ happens as a result of this enhanced process.

Email us: Solutions@RiskProAdvisor.com



2077 West Coast Highway, Suite A
Newport Beach, CA 92663
Office: 866-583-8734

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