

Tolerisk Recognized as a Finalist in the 10th Annual 'Wealthies' Awards

MARLTON, NEW JERSEY , UNITED STATES , July 15, 2024 /EINPresswire.com/ -- Tolerisk, a leading fiduciary-focused risk-tolerance assessment platform, is pleased to share that it has been named a finalist for the [2024 WealthManagement.com Industry Awards](#) ("the Wealthies"). Tolerisk is one of three finalists in the Risk Tolerance/Client Profiling category.

The Wealthies recognize individuals, companies, and organizations making a significant impact on financial advisor success. Now in its 10th year, the Wealthies received a record-breaking 1,000 entries from more than 400 companies, demonstrating its high regard in the wealth management industry.

"This recognition underscores our commitment to financial advisors, wealth managers, and their clients," said Mark Friedenthal, CEO & Founder of Tolerisk. "Risk assessments are a powerful catalyst for advisors to drive client engagement, understanding, and more informed decision-making. We're proud to elevate the benchmark for risk assessment technology through a more data-driven, client-centric approach."

Revolutionizing Risk Assessments Through Ongoing Innovation:

Tolerisk's nomination centers on several [significant upgrades to its Portfolio Scoring feature](#). Designed to streamline the risk assessment process, inform stronger decision-making, bolster client relationships, and drive more efficient proposal generation, the upgrades represent Tolerisk's dedication to solving advisors' most pressing day-to-day challenges.

The feature upgrades include:

-Enhanced Graph Visualizations: A new Probability of Returns Graph allows advisors to demonstrate a client's 90-99% probability of returns within a 3-12 month range.

-More Robust Data: Tolerisk added Expense Ratio data for all generated portfolios. Increasing transparency in investment performance.

-Portfolio Comparison Views: The new Portfolio Comparison tool allows users to compare up to four portfolios and view analytics, assisting in advisors' proposal generation process.

Tolerisk also has its innovative Funded Level Chart feature. Created to replace static models typically used in risk assessment, the Funded Level Chart shows the percentage of future expenses funded and its growth over time, illustrating a client's progress toward financial goals. This empowers them to make informed decisions about retirement and lifestyle trade-offs.

Demonstrated Commitment to Advisor Success:

Tolerisk's dedication to advisors and the clients they serve is reflected in its 8.87 user satisfaction rating in the 2024 T3/Inside Information Survey. Named a "Software All-Star," Tolerisk is celebrated for its exceptional client experience and ever-evolving suite of impressive features.

"The way advisors work is always changing, so their technology platforms need to keep pace and push the boundaries of disruption," shared Friedenthal. "Our commitment to ongoing risk assessment innovation always harkens back to finding the most impactful ways to support advisors' own commitment to their clients."

The winners of the 2024 Wealthies will be announced on Sept. 5, 2024 at the Ziegfeld Ballroom in New York, NY.

To learn more about Tolerisk, visit our website or [book a personalized demo](#).

About Tolerisk

Tolerisk® is an analytical, two-dimensional risk-tolerance assessment tool designed to improve and enhance advisor-client relationships through in-depth risk evaluations. In contrast with traditional risk tolerance assessment tools, Tolerisk measures a host of factors, including a client's willingness and ability to take investment risk, client and advisor risk assumptions and the evolution of risk factors over time. For more information, visit <https://www.tolerisk.com/>.

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