



Align's Unique Approach

Our Engine can help drive performance.

Our professionally managed asset management approach can help guide your investments while keeping your goals on track. By providing just a little information, we can help identify your goals and objectives. We can then create an investment profile based on your time horizon, risk attitude, and investment preferences. The Align Investment Engine will manage your investments and monitor your portfolio, according to your goals, automatically.

Just make your first contribution into your investment account, and Align will begin investing money on your behalf. You can get started right away and not worry about making complicated investment decisions. We'll keep you updated on your financial progress, and you can check that progress at any time, simply by logging in to your personal dashboard.

The Align Investment Engine constructs portfolios to optimize or maximize expected return based on a given level of market risk, emphasizing that risk is an inherent part of higher reward. You complete a quick survey to answer questions about your goals, financial experience, and time horizon, and our Engine will help you determine the asset allocation that's appropriate for you. This means you can see exactly what percentage of your portfolio is stocks, bonds, and alternative investments.