



# Tolerisk Revolutionizes Client Experience with Powerful Portfolio Scoring Upgrades

*The enhanced Portfolio Scoring Tool is a finalist in the 2024 Wealth Management Awards for Risk Tolerance/Client Profiling.*

MARLTON, NEW JERSEY, UNITED STATES, June 10, 2024 /EINPresswire.com/ -- Tolerisk, a leading fiduciary-caliber risk tolerance assessment technology provider, announced several significant upgrades to its Portfolio Scoring feature, designed to transform the client experience and empower informed investment decisions.

"These enhancements demonstrate our unwavering commitment to supporting advisor practice growth and reducing compliance risk," said Mark Friedenthal, CEO & Founder of Tolerisk. "By empowering advisors with the tools they need to foster informed decision-making and build trust with their clients, we're on a mission to revolutionize the delivery of investment advice."

The latest upgrades to the Portfolio Scoring tool streamline the risk assessment process and provide actionable insights for advisors and clients. Following their 2023 UI redesign, which achieved an impressive user satisfaction rating of 8.87, the tool has been enhanced further, earning recognition in the 2024 Wealth Management Awards in the Risk Tolerance/Client Profiling category. Tolerisk introduces three key features:

-[Probability of Returns Graph](#): This feature visualizes the 90-99% probability of returns within a 3-12 month range. Advisors can leverage this clear data to guide clients toward informed investment choices with a deeper understanding of potential outcomes.

-Expense Ratio Data: This feature integrates Expense Ratio data for all generated portfolios. This increased transparency fosters trust and confidence, allowing clients to see a complete picture of their investments.

-[Portfolio Comparison Tool](#): This feature allows advisors to create and compare up to four unique portfolios to clients' Tolerisk risk assessment scores. The comparisons can also be included in clients' portfolio analytics reports for easy sharing and visibility, enhancing the proposal generation process by providing comprehensive and easily understandable comparisons.

These upgrades offer many benefits for both advisors and investors, including:

-Informed Decision-Making: Reduce guesswork and emotional bias by clearly visualizing potential outcomes.

-Improved Risk Management: Understand the range of potential returns to align investor strategies with risk tolerance, leading to greater comfort and confidence.

-Enhanced Client Relationships: Strengthen client trust in an advisor's expertise by showcasing the ability to navigate investment complexities.

-Transparency & Trust: Empower clients to understand investment costs and make informed allocation decisions.

-Reduced Compliance Risk: Comply with regulations and standards, minimizing potential misunderstandings or disputes.

-Efficient Proposal Generation: Quickly generate and present tailored investment proposals, saving time and enhancing client engagement.

These features are a direct reflection of client input. "Our customers asked for a clearer picture of potential returns, more transparency around investment costs, and the ability to compare portfolios — and that's why we developed these new tools," said Friedenthal. "These enhancements showcase our commitment to continuous improvement and position Tolerisk as the partner you can trust to elevate your practice."

To learn more about these features, watch the tutorial or [book a personalized demo](#).

#### About Tolerisk

Tolerisk® is an analytical, multidimensional 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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