



Kovack Securities: RiskPro

KEITH HLASNY - DIRECTOR OF VENDOR TECHNOLOGY SOLUTIONS

What is RiskPro?

Software technology with a risk profiling and portfolio construction system that evaluates and clearly communicates risk for investors, advisors and Kovack home office. RiskPro provides accurate risk measurement down to the individual security level for new and existing accounts.

RiskPro Timeline

- October 2019 – Soft launch
- January 2020 – Live launch
 - Required for all advisors
 - Monthly fee \$50
- July 1, 2020 – Regulation Best Interest (Reg BI)
 - Risk Profile Questionnaire

RiskPro

LIVE DEMO...



RiskPro

QUESTIONS?