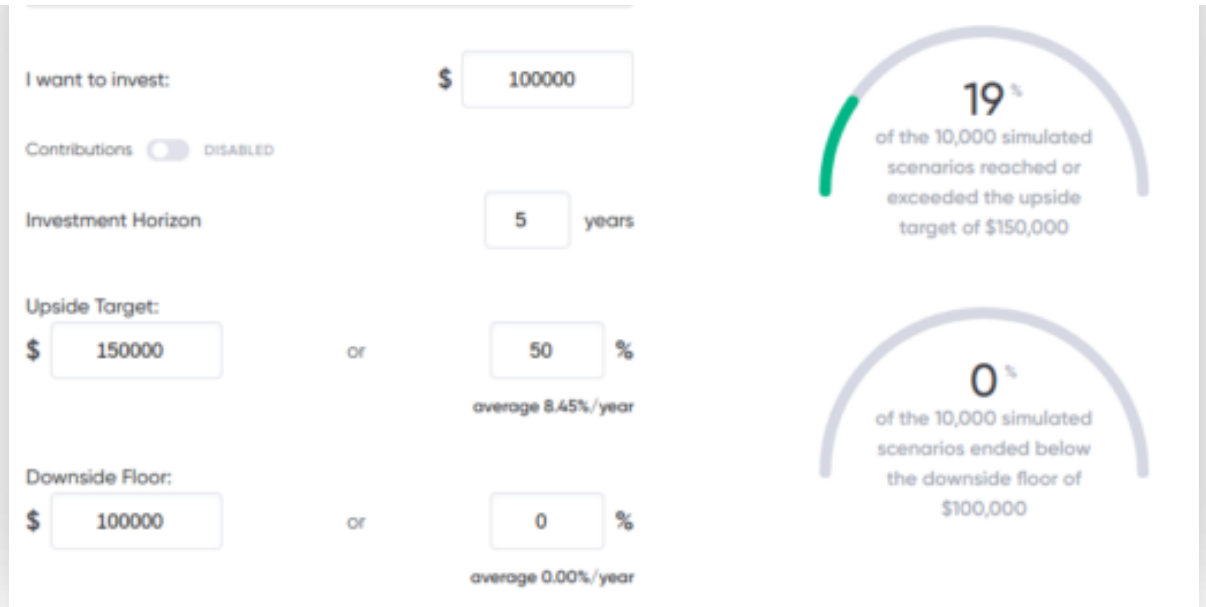# OPTIMAL
ASSET MANAGEMENT

Invest with a safety net

Set your upside target and preset loss limit, our intelligent investment engine does the rest.

FOR ADVISORS

FOR INDIVIDUAL INVESTORS

TRY THE GOOSE® PLAYGROUND

One-click control over downside

Goal Based Investing means that you get to pick the maximum loss that you can bear by setting a **downside floor** level and a **target date** for your investment account. You can also specify your **upside target** level. Our Goal Optimizing Outcome Shaping Engine algorithm does the rest – automatically allocating between expertly designed stock and bond portfolios to maximize the chances of hitting your upside target without ending up below your downside floor when you reach your target date.
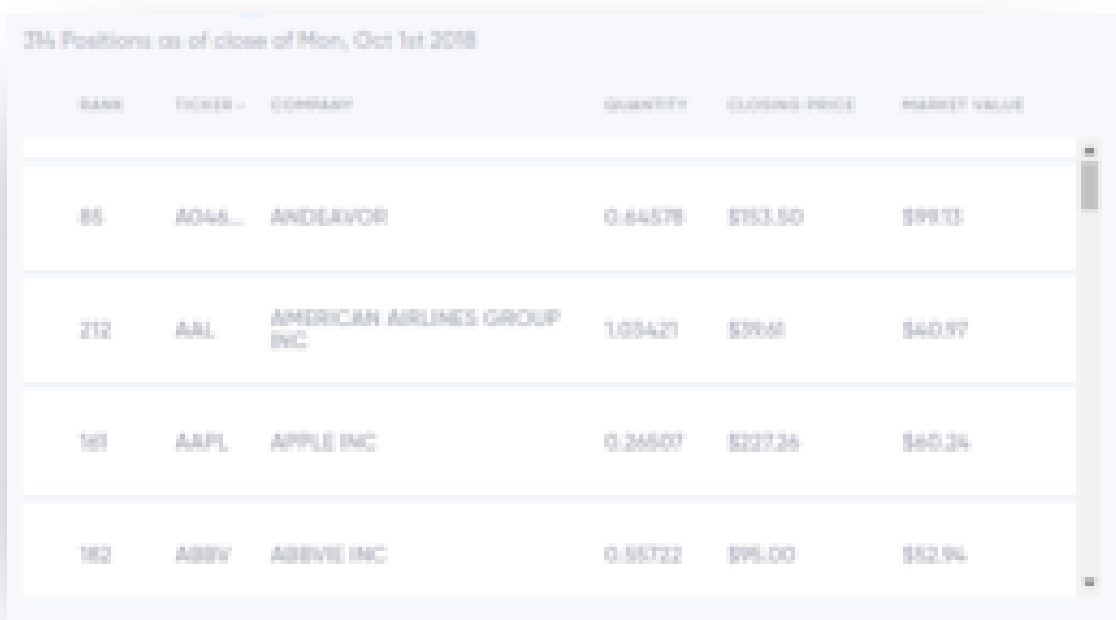
LEARN MORE

TRY IT NOW

Investment Goals, Powered by Science

Our approach to Goal Based Investing is derived from the same science that powers the largest and the best pension funds in the world. Our Goal Optimizing Engine implements algorithms that

Your goal might be to secure a certain minimum amount of income in retirement, a minimum down payment needed for a house, a minimum level of college expenses … or one of thousands of other use cases that involve seeking investment upside but limiting maximum downside to a specified floor level at a target date.

HERE ARE A FEW BILLION REASONS TO TRUST US …

We act as the sub-advisors or advisors on your account, which is always held at a FINRA regulated broker-dealer and qualified custodian, and your investments are protected by the SIPC up to $500,000. For details, please see www.sipc.org.

We take security seriously, and your personal information is fully encrypted and securely stored.

And, we have been designing portfolios for large institutions since 2013 …

OPTIMAL
ASSET MANAGEMENT
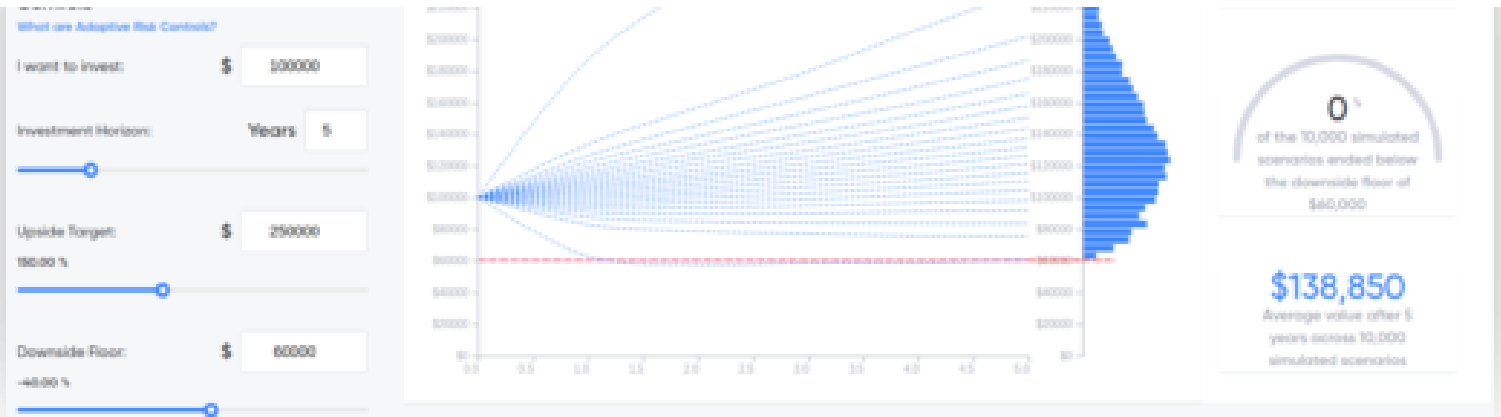
$750+ million in Discretionary AUM

How it all works

- ✔ Your account value and settings are regularly **monitored** for changes
- ✔ We **compute** your *risk budget* from your account, upside and downside levels
- ✔ The engine **reallocates** to a mix of stocks and bonds
- ✔ The rebalancer **generates trades** as needed

You can update your downside floor and upside target, change strategies, liquidate a strategy to generate cash, use available cash to make new allocations to a strategy anytime you like. Your trades are usually implemented the very next business day!

LEARN MORE

Optimal's rebalancing engine is continually working to *maximize the probability of reaching your upside target without violating your downside protection goal*

Support: Live, friendly and human!

Live, clueful, oversight and assistance when you need it

(doing what humans do best)

OPTIMAL
ASSET MANAGEMENT

(doing what computers do best)

TALK TO US!

GET STARTED NOW

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Before investing, consider your investment objectives and consult with your Registered Investment Advisor for more information.

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