



# INVESTMENT ADVICE SERVICE BY WWF

PERSONALIZED STRATEGIES

GLOBAL ACCESS

EXPERT CARE

# WHAT TO EXPECT FROM OUR INVESTMENT ADVICE SERVICE



## REVIEWS AND REBALANCING

Regularly review the client's investment portfolio and rebalance it as needed to ensure it remains aligned with their goals and risk tolerance.





# INVESTMENT RESEARCH

Conduct thorough research to identify suitable investment opportunities that align with the client's investment objectives and risk tolerance.





## **SUPPORT AND COMMUNICATION**

Offer ongoing support and communication to clients, addressing their questions, concerns, and changing financial needs over time.

**THAT'S RIGHT  
AND THAT'S  
NOT ALL!**



Keep scrolling — it gets even better!







# ASSET ALLOCATION

Help clients allocate their assets across different investment categories (e.g., stocks, bonds, etc.) based on their risk profile and investment objectives.

# LOOKS GREAT, RIGHT?



## PERFORMANCE REPORTING

Provide performance reports to clients, detailing the performance of their investment portfolio relative to their goals and benchmarks.





# ALLA STARODUBTSEVA

Executive Director  
of Wise Wolves Finance

“We don’t just manage wealth — we build long-term confidence through personal guidance, expert decisions, and relationships that grow stronger with every step.”