Determine Your Asset Allocation Strategy



BOK FINANCIAL®

StartRight. RetireRight.®

We Can Help

Asset allocation is an important concept. How much of your investment portfolio should be in stocks, bonds, and cash? The answer to this question is different for each individual, but how do you determine the right answer for you?

Through BOK Financial's website – startright.bokf.com – you have access to a number of tools that can help you plan for your future, including an investor questionnaire. The investor questionnaire provides a sample asset allocation for an investor with similar investment objectives, experience, time horizon, risk tolerance, and financial situation. As your financial circumstances or goals change, it may be helpful to revisit the questionnaire to determine if changes are needed in your asset allocation.

Visit startright.bokf.com today to help you determine an asset allocation that is right for you. For personal assistance call Participant Services at 800.876.9557.

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