



FinaMetrica

Risk Tolerance Profiling



Right advice, from the very first meeting



Happy clients are valuable clients



A tick in every box



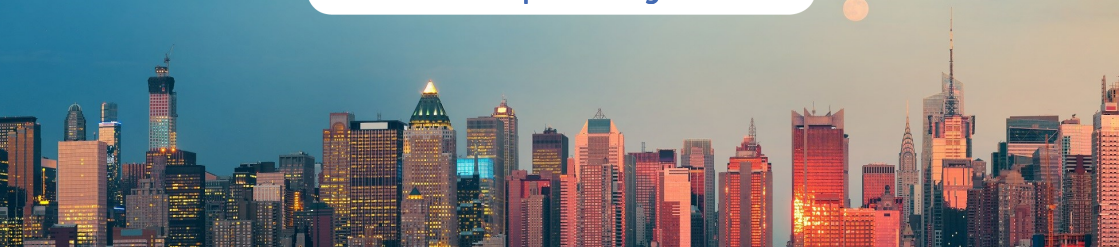
Tried and trusted

*"There are other instruments and other methodologies [for risk tolerance assessment], but I haven't seen any that are as academically and procedurally defensible as this." - **Bob Veres, Inside Information***

*"FinaMetrica is a world leader in developing sound, practical tools that enable practitioners to address the single most important factor in guiding clients towards a successful investment program - their personal risk profile."
Harold Evensky, Evensky & Katz Wealth Management*

*"The best way to measure risk tolerance is with a genuine psychometrically designed risk tolerance questionnaire for which FinaMetrica is the clear leader." - **Michael Kitces, Pinnacle Advisory Group***

www.riskprofiling.com



Create lifetime relationships, through better advice that results in clients who refer more, invest more and remain suitably invested through market highs and lows.

Why

We help financial services organisations form profitable, lifetime relationships with clients.

How

We connect advisors and corporates with clients as individuals, ending the life-stage stereotyping.

What

We use the world's most awarded and highly endorsed FinaMetrica Risk Tolerance Toolkit™ — validated on over one million people.

FinaMetrica strives to facilitate and improve communication between clients. There are four risk consistencies that ensure an enterprise communicates effectively about risk both internally and with clients.

1. scalable scientific risk profiling that meet the needs of all clients;
2. an empirical foundation for the mapping of risk scores to portfolios;
3. a practical process to frame performance against expectations and
4. the standardisation of language and clear communication of risk.



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CLIENTS FOR LIFE

