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FINAMETRICA LAUNCHES ENHANCED RISK PROFILING SYSTEM

“FinaMetrica Plus” Designed to Improve Client Relations and Help Advisors Properly Gauge Client Risk Appetite

ATLANTA; February 12, 2015 – FinaMetrica, a worldwide leading provider of risk tolerance assessment tools for financial advisors, announced today the U.S. launch of its new integrated and expanded risk profiling system, FinaMetrica Plus. The new system, which boasts a more user-friendly interface, is designed to raise the level of advisor-client engagement, help clients better understand their investments, and assist advisors in performing proper client risk assessment.

One of the key features of FinaMetrica Plus is a 12-question risk tolerance test, which complements FinaMetrica’s established 25-question test. This new version, primarily geared toward larger businesses such as banks, life companies, and pension funds, allows advisors to better service segmented client propositions with a consistent enterprise risk solution. It maintains the full psychometric integrity of the original test, as well as a high degree of accuracy and validity.

“Risk tolerance assessment is not just an important step in the financial planning process. It’s a regulatory requirement for advisors,” said Paul Resnik, co-founder and director of FinaMetrica. “With FinaMetrica Plus, we’ve made it easier for advisors and wealth managers across multiple service channels in a large business to measure risk tolerance consistently and reliably.”

FinaMetrica Plus features an asset allocation mappings service that allows advisors to interactively compare their client’s risk tolerance with the risk in both their current and target portfolios. It also includes a new integrated gap analysis calculator that provides snapshots of FinaMetrica’s risk and return guide for 11 illustrative portfolios, ranging from 0% to 100% growth assets. Advisors can highlight current and target portfolios, allowing clients to see comparable 40-year historical risk-and-return data.

To make conversations with clients more rewarding and structured, FinaMetrica Plus has introduced a “couple’s report” tool for married and non-married partners. The purpose is to highlight personal risk tolerance differences more clearly and encourage partners to engage in honest risk discussions, which in turn can lead to better and more collaborative investment decisions.

“Our goal has been the same since FinaMetrica launched in the U.S. in 2002: to deliver the most effective risk tolerance tool set to the advisory community,” said Tyler Nunnally, FinaMetrica’s head U.S. strategist. “FinaMetrica Plus provides a more interactive space for advisers to share risk reports, preferred mapped portfolios, and select historical performance characteristics with clients. These tools help ensure investment appropriateness—the core of all good financial advice—and help advisers properly frame clients’ investment expectations through bull and bear markets.”

About FinaMetrica

FinaMetrica is an Australia-based company, with U.S. operations based in Atlanta, Georgia, that specializes in risk tolerance and risk-related matters. In 1998, it launched the FinaMetrica Risk Profiling System to help advisers make better investment decisions and set proper risk-and-return expectations for their clients. The system uses psychometrics, a scientific discipline blending psychology and statistics, to ensure reliability and validity. Since inception, the system has been adopted by 5,500 advisers across 23 countries in seven languages, with more than 750,000 risk tolerance tests completed. For more information, please visit www.riskprofiling.com.

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