



FINAMETRICA AND MACRORISK ANALYTICS ANNOUNCE COLLABORATION TO PERSONALIZE PORTFOLIO CONSTRUCTION

ATLANTA; March 3, 2015 – FinaMetrica, a leading global provider of risk tolerance assessment tools, announced today a collaboration with portfolio risk experts MacroRisk Analytics (“MacroRisk”), creators of the established 18-factor Eta® Pricing Model that accounts for over 90% of equity price changes. The collaboration will allow advisors to directly link a client’s risk tolerance score, as measured by FinaMetrica, to MacroRisk’s portfolio allocation testing capabilities.

Through this joint effort, FinaMetrica and MacroRisk will align their product offerings in order to provide advisors with a unique solution to fine-tune portfolios for their clients. The primary goal is for U.S. investment advisors to better engage clients, enrich their conversations, and help clients take ownership of their investment decisions and, consequently, their financial future.

“The Registered Investment Advisory (RIA) community is increasingly moving towards personalized investment advice to combat emerging business threats such as robo-advisors. A critical part of this process is measuring risk tolerance,” said Paul Resnik, co-founder and director of FinaMetrica. “Our job is to help advisors properly assess a client’s risk tolerance and apply the outcome to constructing personalized investment portfolios. With MacroRisk’s powerful portfolio risk analytics, these solutions will provide more predictable outcomes for investors and allow them to participate more actively in the investment decision-making process.”

“People are living longer, and as a result, retirement portfolios needs to work harder for longer,” said Michael Phillips, co-founder of MacroRisk. “Our goal with FinaMetrica is to expand and streamline MacroRisk’s capabilities to construct highly customized bespoke portfolios, specifically tailored toward each client’s needs and circumstances. Through this collaboration, advisors can work in tandem with their clients to examine likely portfolio responses to major economic factors, including interest-rate movements or changes in the oil price, while taking into account their risk tolerance levels.”

The newly combined solution will be available to FinaMetrica’s and MacroRisk’s clients starting June 30. For subscription information, interested parties should contact Tyler Nunnally (tyler.nunnally@finametrica.com) or Bill Jennings (info@macrorisk.com).

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 advisors 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 advisors across 23 countries in seven languages, with more than 750,000 risk tolerance tests completed. For more information, please visit www.riskprofiling.com.

About MacroRisk Analytics

MacroRisk Analytics is the only platform offering the patented Eta® Analysis tools for identifying and responding to investment risks. By providing cutting edge analytical, optimization, and “what if” features, the MacroRisk platform supports financial planners and wealth managers from Wall Street to Main Street, from hedge fund managers and fund index advisors to retirement consultants, family offices, and personal investors, and is used in college investment programs across the country. For more information, please visit www.MacroRisk.com.

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