

# PRESS RELEASE

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## **Financial Express (FE) implements FinaMetrica's risk profiling technology**

FinaMetrica is pleased to announce the implementation of its risk tolerance score technology for industry-leading data and software provider Financial Express (FE).

Currently used by thousands of leading financial advisers across the globe, FinaMetrica's award-winning risk profiling process scientifically assesses a client's risk tolerance, helping advisers to deliver suitable investment advice and encouraging clients to stay invested and achieve their financial goals. More than a million FinaMetrica risk tolerance profiles have been completed to date.

FinaMetrica's methodology for mapping risk tolerance scores has been introduced as part of FE's asset allocation tools, allowing advisers to make an 'apples-to-apples' comparison between a client's own risk tolerance and the inherent risk in the investment strategy required to achieve their goals.

The FE FinaMetrica classification automatically breaks down a broad range of equity and fixed income asset classes to enable a quick overview of a client's current allocations. Advisers can view the overall growth versus defensive assets split within client portfolios, enabling them to identify if a particular portfolio fits with the client's risk tolerance comfort zone.

The FE FinaMetrica module is available now for no extra costs – advisers simply need to contact FE to activate this new feature.

Commenting on the launch of the new FE FinaMetrica partnership, Paul Resnik, Co-Founder and Director of FinaMetrica, said: "There is a growing body of evidence to suggest that investors with unframed risk and investment expectations run underperforming portfolios, as they will be more prone to make more emotional responses that can lead to value diminishing market timing.

“At FinaMetrica we believe there should be no investment surprises in a client-focused world and we are confident that our work with FE will help ensure that investors are able to give truly informed consent before making any investment decisions. It is our belief that this latest development from FE marks an important step in the right direction for adviser firms of all shapes and sizes, from one-man operations through to larger scale enterprises.”

Matt Surfleet, Commercial Director at Financial Express, also commented: “We are excited to be working with FinaMetrica as part of our drive to constantly look for ways to improve our service for both advisers and their end clients. Risk profiling certainly looks set to become a key addition to our existing toolkit for advisers given the continued focus that is being placed on client suitability throughout the financial services market, making this a really positive development for our business.”

**ENDS**

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### **About FinaMetrica**

The FinaMetrica Risk Tolerance Toolkit™ helps advisers and enterprises create lifetime clients through better financial advice. It was launched in 1998, developed and trialed in Australia over four years with the assistance of the University of New South Wales. It’s now maintained with senior academics from the London School of Economics and has gained international recognition as the world’s best practice risk profiling. The Toolkit’s reliability and validity is backed by over a million profiles set up by thousands of independent financial advisers in over 20 countries.