Advicefront Integration Setup

1. Introduction

The following guide provides details on how to:

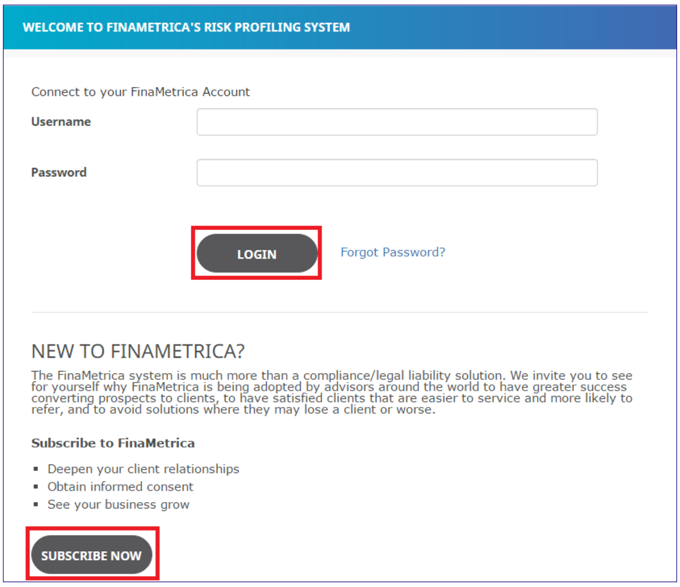
- ❖ Connect to FinaMetrica from the Advicefront portal.
- ❖ View FinaMetrica risk tolerance score and report from within Advicefront.

2. Connect to FinaMetrica from the Advicefront Portal

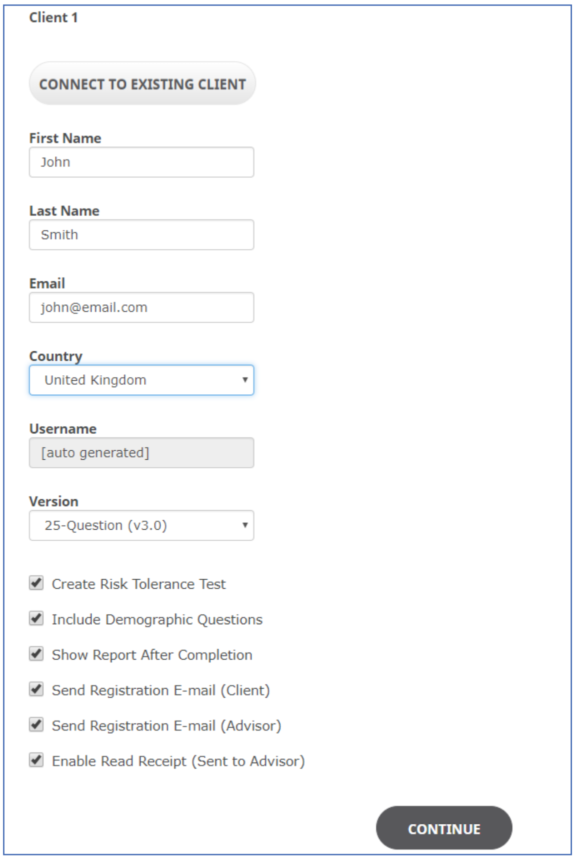
a. Select FinaMetrica as your Risk Provider under Account Settings > Firm Settings > Services.

b. Then select a client and click on **Send to FinaMetrica** under the **Risk** menu heading.

c. If you have an existing FinaMetrica account, please enter your credentials and login. You only have to do this once, subsequent visits will take you straight into your FinaMetrica account. Advisors new to FinaMetrica can sign up for a complimentary 30-day trial. You'll be asked to confirm your details upon subscription. Again, you only have to do this once, subsequent visits will take you straight into your FinaMetrica account.

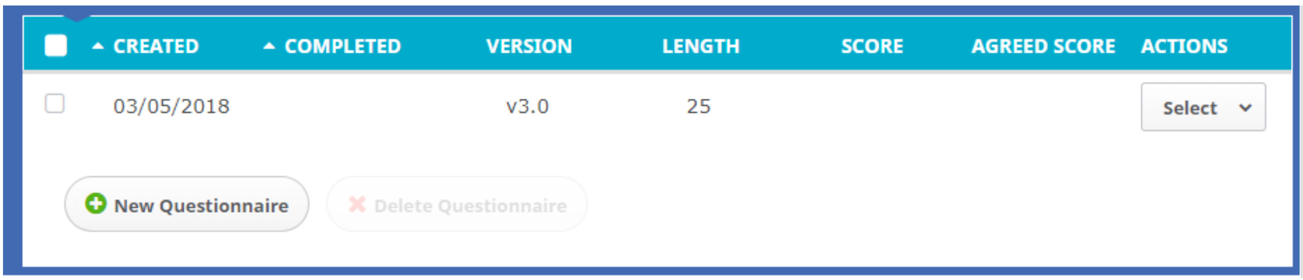


d. Your clients' details will be presented as shown below.



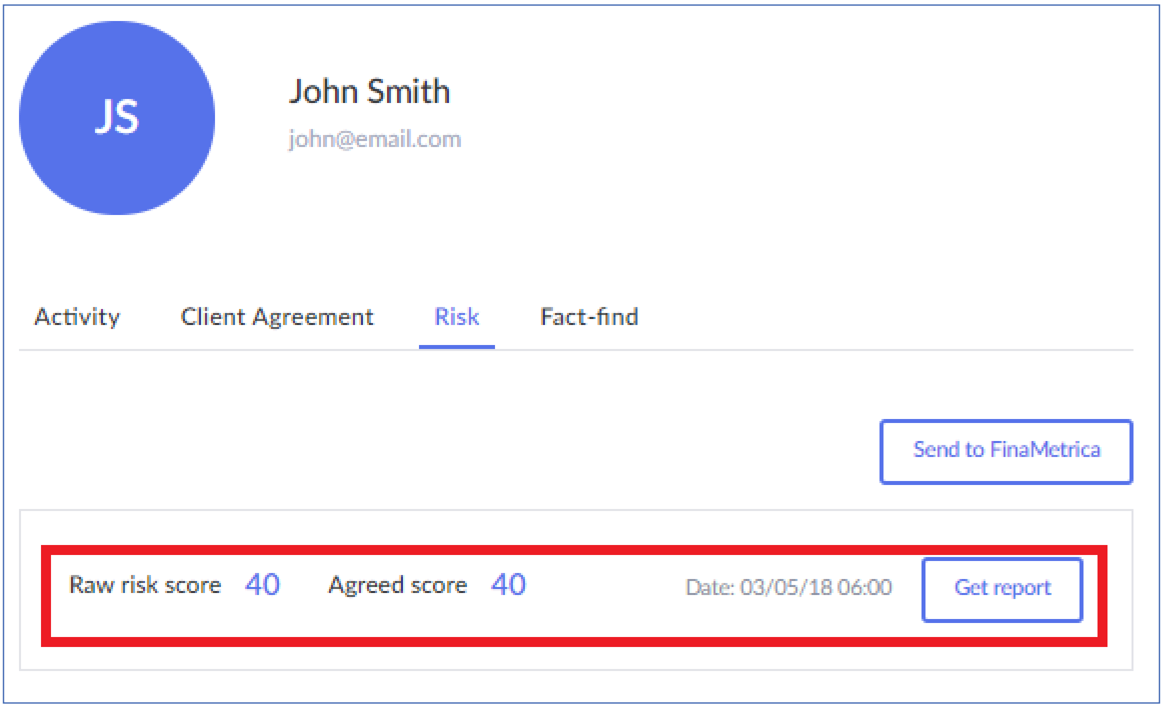
- ❖ If your clients have already been created in FinaMetrica previously, you can link them up by clicking on **Connect to Existing Client**. You'll be presented with a list of existing clients to select from. Select appropriate options for then click **Continue** to proceed.
- ❖ For clients new to FinaMetrica, select appropriate options for each client then click **Continue** to proceed.
- ❖ You only have to do this once, subsequent visits for linked clients will take you straight into your their FinaMetrica accounts.

e. You'll then be presented with your clients' risk tolerance details. For advisors new to the FinaMetrica portal, please refer to the QuickStart Guide under Resources for details on how to navigate the site.

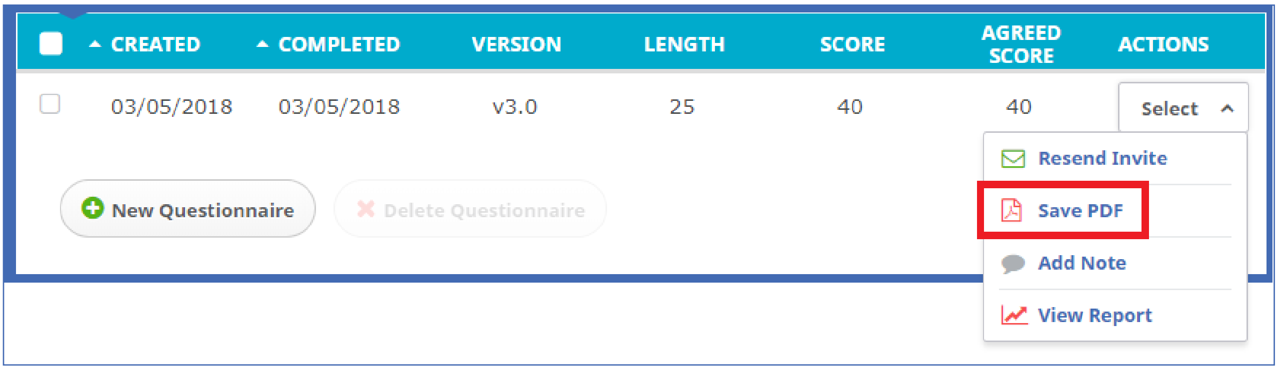


3. View FinaMetrica risk tolerance score and report from within Advicefront.

a. Once your clients have completed the FinaMetrica questionnaire, you'll be able to view the score and report from within FinaMetrica as well as from Advicefront under the **Risk** menu heading.



b. The score will populate automatically, however the risk report will only populate once it has been generated in FinaMetrica.com either by the client or the advisor. This can be done via the **Save PDF** function on Finametrica.com under the **Select** drop-down menu in the **Clients** tab.



c. To generate a new test for your client, click on **Send to FinaMetrica**, and click on **New Questionnaire**.

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