AdviserLogic Integration Setup
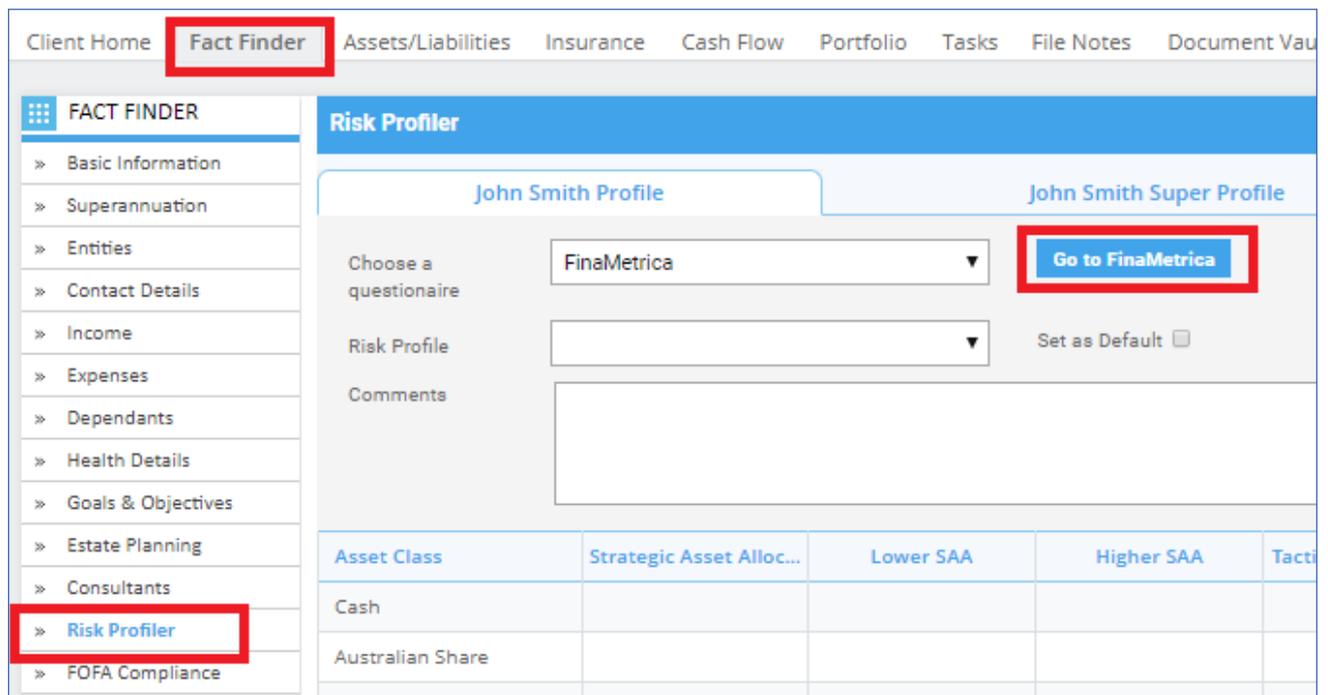
1. Introduction

The following guide provides details on how to:

❖ Connect to FinaMetrica from the AdviserLogic portal.

❖ View FinaMetrica risk tolerance score and report from within AdviserLogic.

❖ Accessing the Risk Profile Portfolios
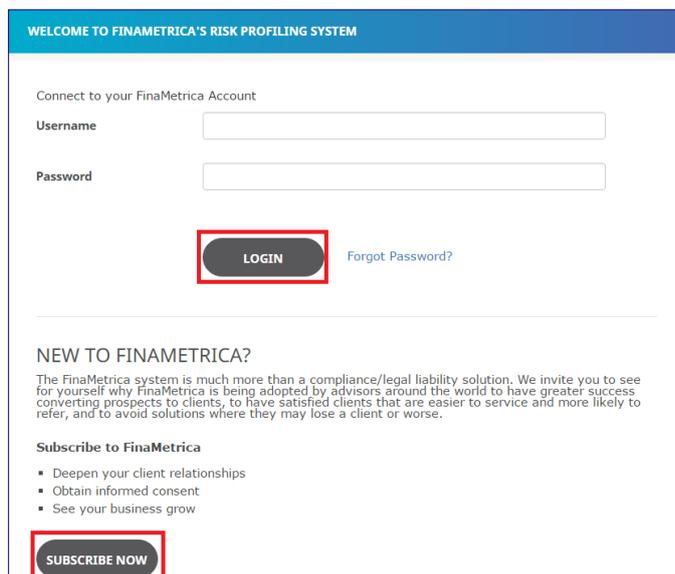
2. Connect to FinaMetrica from the AdviserLogic Portal

a. After selecting a contact, click on **Risk Profiler** under the **Fact Finder** menu heading.

b. On the next screen select FinaMetrica from the drop down and click on **Go to FinaMetrica.** If you do not see the button, please contact **AdviserLogicSupport@morningstar.com** to enable the FinaMetrica integration on your account.

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

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.
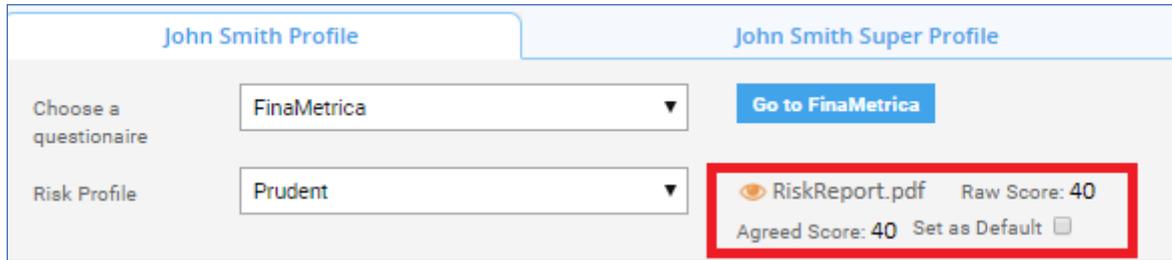
	▲ CREATED	▲ COMPLETED	VERSION	LENGTH	SCORE	AGREED SCORE	ACTIONS
☐	03/05/2018		v3.0	25			Select ⌄

➕ New Questionnaire   ✖ Delete Questionnaire

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

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 AdviserLogic. After selecting a contact within AdviserLogic, click on **Risk Profiler** under the **Fact Finder** 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.

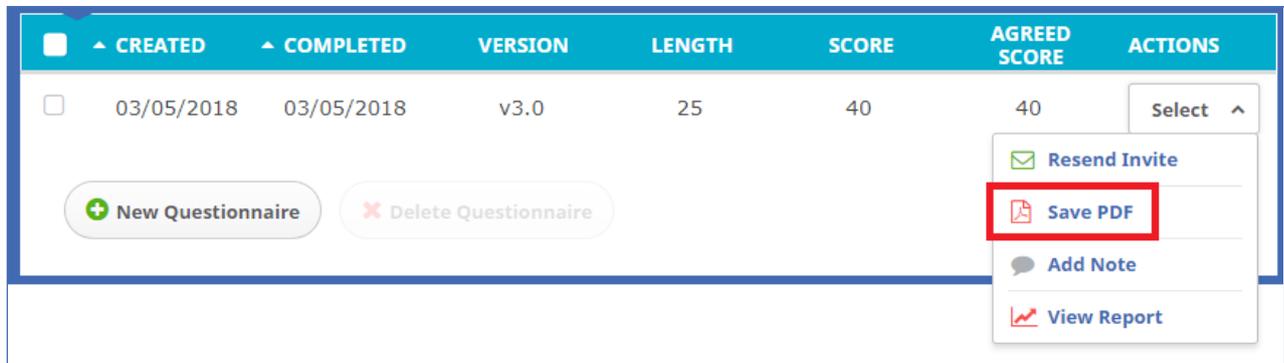## 3. View FinaMetrica risk tolerance score and report from within AdviserLogic.

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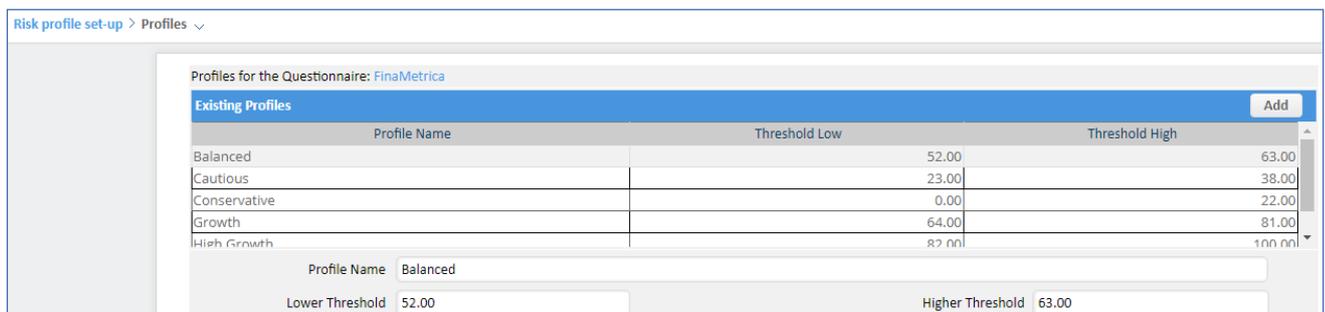

c. To access the report, click on the *eye* symbol after *RiskReport.pdf* in AdviserLogic.
d. To generate a new test for your client, click on **Go to FinaMetrica**, and click on **New Questionnaire**.
e. If you would like to unlink the FinaMetrica profile from your client in AdviserLogic, click on the **Reset** button.

4. Accessing the Risk Profile Portfolios

a. Navigate to **Tools > Practice Management >Risk Profile Setup** and click on **FinaMetrica** and then the [Risk Profiles] hyperlink at the bottom left corner of the screen.
b. Here you will be able to make edits to the Risk Profile portfolios and the FinaMetrica score ranges associated with each portfolio. To calculate the FinaMetrica score ranges, please go to My Portfolios on the FinaMetrica service portal.