

Intelliflo Integration Setup

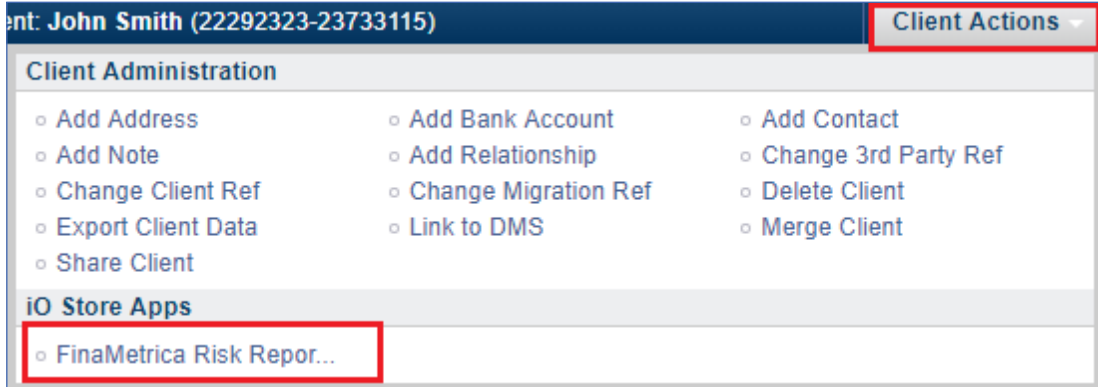
1. Introduction

The following guide provides details on how to:

- ❖ Connect to FinaMetrica from the Intelliflo portal.
- ❖ View FinaMetrica risk tolerance report from within Intelliflo.

2. Connect to FinaMetrica from the Intelliflo Portal

- a. Install the FinaMetrica App from the iO store.
- b. After selecting a client, click on **Risk Report** under the **Client Actions** menu heading.



Client: John Smith (22292323-23733115) **Client Actions**

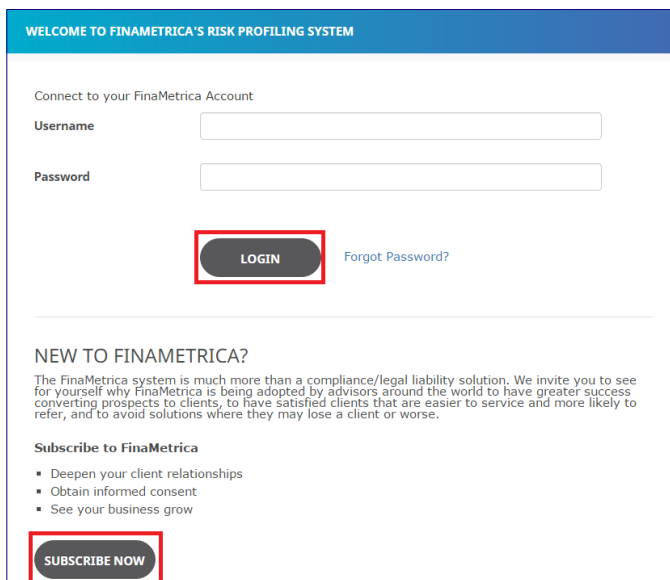
Client Administration

- Add Address
- Add Bank Account
- Add Contact
- Add Note
- Add Relationship
- Change 3rd Party Ref
- Change Client Ref
- Change Migration Ref
- Delete Client
- Export Client Data
- Link to DMS
- Merge Client
- Share Client

iO Store Apps

- FinaMetrica Risk Repor...

- 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.



WELCOME TO FINAMETRICA'S RISK PROFILING SYSTEM

Connect to your FinaMetrica Account

Username

Password

LOGIN [Forgot Password?](#)

NEW TO FINAMETRICA?

The FinaMetrica system is much more than a compliance/legal liability solution. We invite you to see for yourself why FinaMetrica is being adopted by advisors around the world to have greater success converting prospects to clients, to have satisfied clients that are easier to service and more likely to refer, and to avoid solutions where they may lose a client or worse.

Subscribe to FinaMetrica

- Deepen your client relationships
- Obtain informed consent
- See your business grow

SUBSCRIBE NOW

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

Client 1

CONNECT TO EXISTING CLIENT

First Name
John

Last Name
Smith

Email
john@email.com

Country
United Kingdom

Username
[auto generated]

Version
25-Question (v3.0)

☒ Create Risk Tolerance Test

☒ Include Demographic Questions

☒ Show Report After Completion

☒ Send Registration E-mail (Client)

☒ Send Registration E-mail (Advisor)

☒ Enable Read Receipt (Sent to Advisor)

CONTINUE

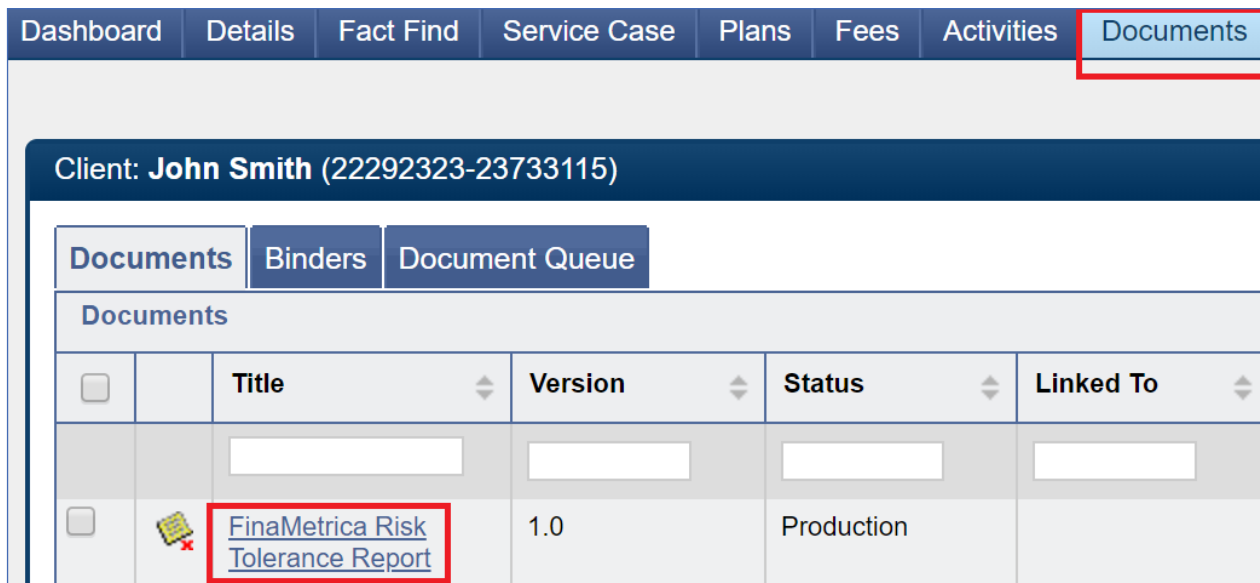
- ❖ If your clients have already been created in FinaMetrica previously, you can link them up by clicking on **Connect to Existing Client**. You'll be presented with a list of existing clients to select from. Select appropriate options for then click **Continue** to proceed.
- ❖ For clients new to FinaMetrica, 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
<input type="checkbox"/>	03/05/2018		v3.0	25			Select
<p>+ New Questionnaire</p> <p>✗ Delete Questionnaire</p>							


3. View FinaMetrica risk tolerance report from within Intelliflo.

- a. Once your clients have completed the FinaMetrica questionnaire, you'll be able to view the report from within FinaMetrica as well as from Intelliflo under the **Documents** menu heading.

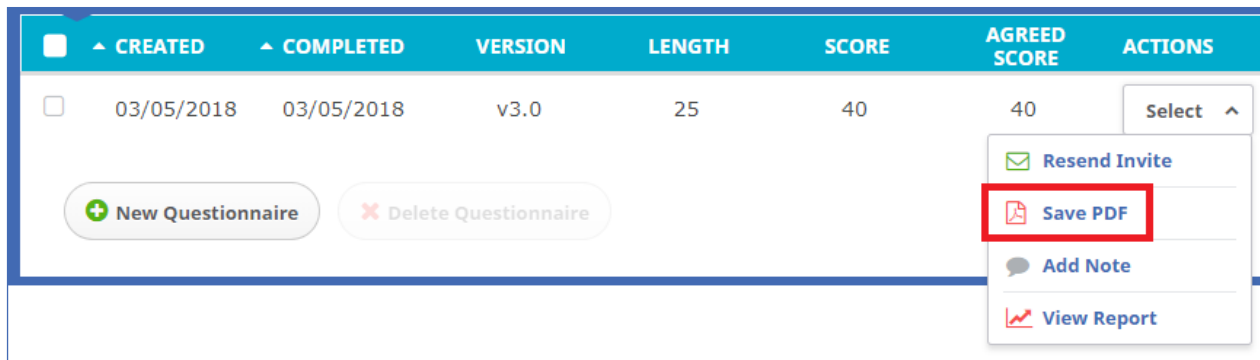


Client: **John Smith** (22292323-23733115)

Documents Binders Document Queue

		Title	Version	Status	Linked To
<input type="checkbox"/>					
<input type="checkbox"/>		FinaMetrica Risk Tolerance Report	1.0	Production	

- b. 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.



	CREATED	COMPLETED	VERSION	LENGTH	SCORE	AGREED SCORE	ACTIONS
<input type="checkbox"/>	03/05/2018	03/05/2018	v3.0	25	40	40	Select ^ Resend Invite Save PDF Add Note View Report

+ New Questionnaire ✕ Delete Questionnaire

- c. To generate a new test for your client, click on **Risk Report** under the **Client Actions** menu heading.



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