RiXtrema Integration Setup

1. Introduction

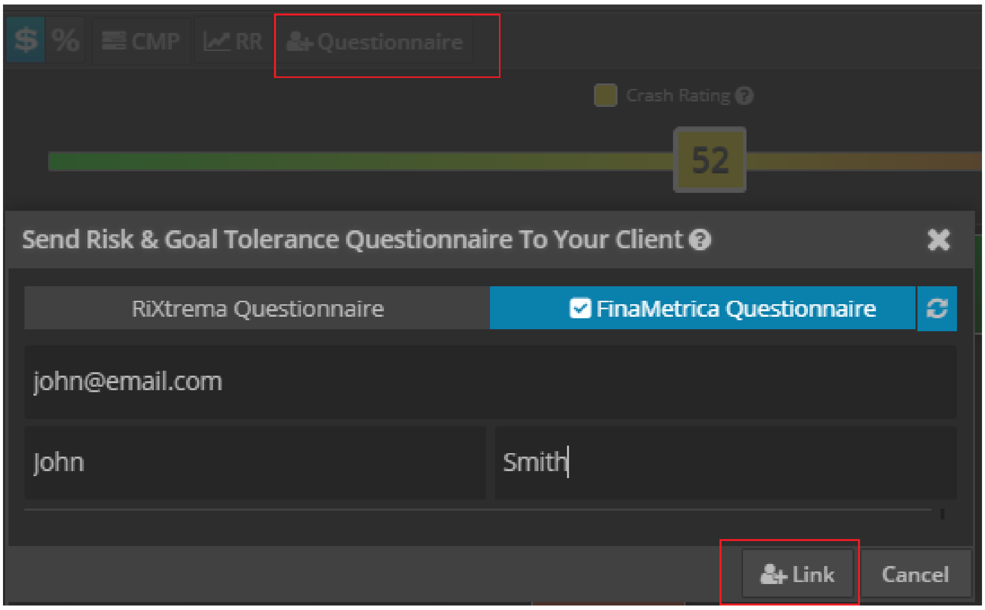
The following guide provides details on how to:

- Connect to FinaMetrica from the RiXtrema portal.
- View FinaMetrica risk tolerance score and date from within RiXtrema.
- Quick client connect

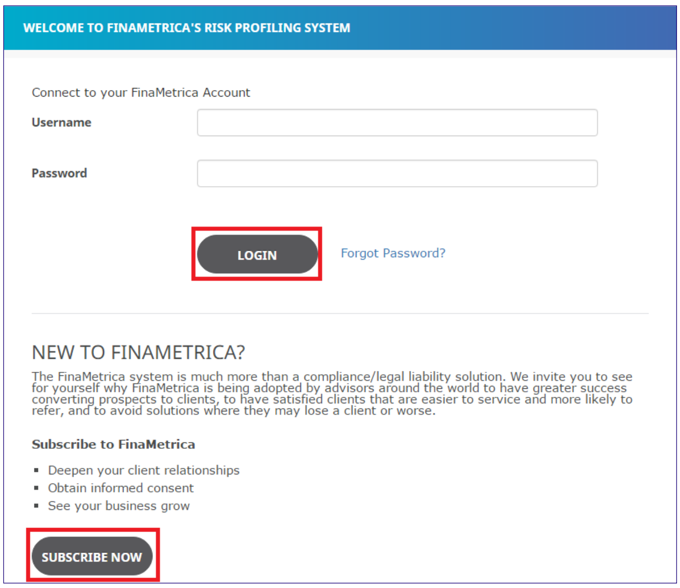
2. Connect to FinaMetrica from the RiXtrema Portal

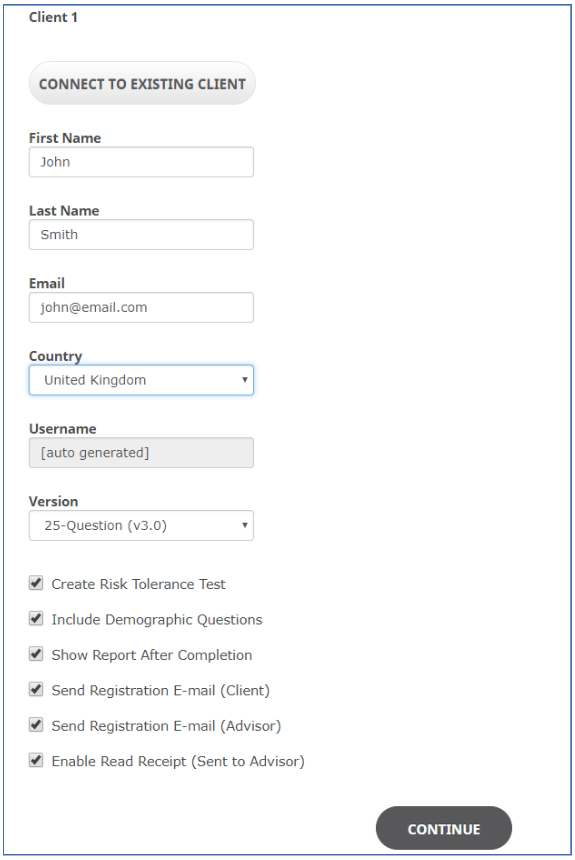
a. After selecting a portfolio, click on the Questionnaire button on the top left hand corner to bring up the questionnaire form.

b. In the pop-up screen, check ‘FinaMetrica Questionnaire’, fill in your client’s details and click Link.



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.

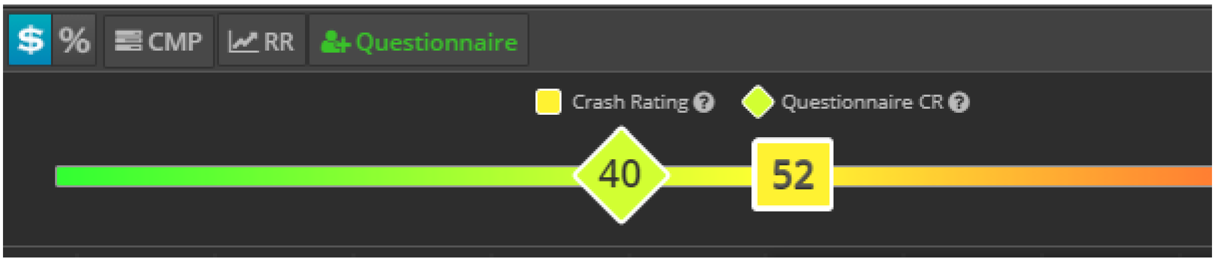
- If your clients have already been created in FinaMetrica previously, you can link them up by clicking on **Connect to Existing Client**. You'll be presented with a list of existing clients to select from. Repeat this step for the partner account. Select appropriate options for each client then click 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 Date from Within RiXtrema

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 RiXtrema. In Portfolio Lookup, you'll be able to see the client's risk tolerance score under Questionnaire Crash Rating. To access the report, click on the green profile then Send Questionnaire or Connect to Existing FinaMetrica Account.

b. You can also see the score in the dashboard screen, and access the report by clicking on Questionnaire then Send Questionnaire or Connect to Existing FinaMetrica Account.



c. To generate a new test for your client, click on Questionnaire as per above, then New Test in FinaMetrica. The old test information will then be cleared from RiXtrema and populated with the latest test results.

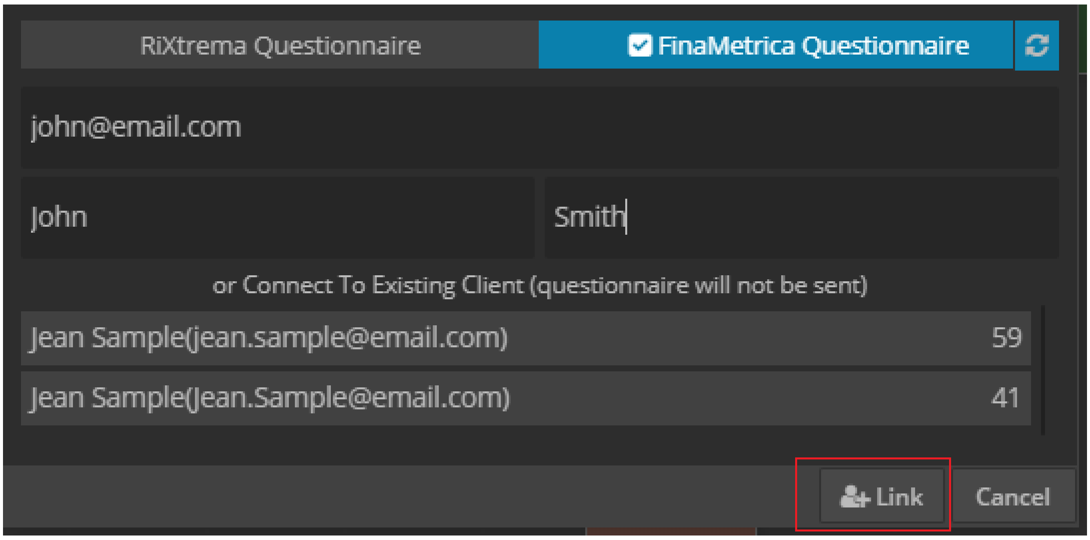
4. Quick Client Connect

Once you have linked up your FinaMetrica account, subsequent new clients can be linked up using the Quick Access method.

a. After selecting a portfolio, click on the Questionnaire button on the top left hand corner to bring up the questionnaire form.

b. In the pop-up screen under FinaMetrica Questionnaire, you'll see a list of FinaMetrica clients who have completed the questionnaire already. This list is refreshed automatically every day, if your client recently completed the questionnaire, just click on the refresh button on the right hand corner to manually refresh the list.

c. Select the client to connect to and the score will be inputted into the RiXtrema system.



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