



Press release
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threesixty sees strong demand for new Investor Profiler tool

Support services firm threesixty has seen strong demand for its new Investor Profiler tool, developed in conjunction with FinaMetrica, with 68 firms signing up in the first month since launch.

Investor Profiler uses FinaMetrica's 12-question psychometric test, which allows financial advisers to understand and accurately measure a client's tolerance to financial risk. This risk tolerance can then be mapped to strategic and tactical model portfolios and asset allocation models for advisers wishing to select their own funds, or to the wide selection of managed investment solutions already mapped by FinaMetrica.

threesixty Managing Director, Phil Young, commented: "The Investor Profiler solution fits with our ethos that advisers should not slavishly follow a linear process and dump clients into the nearest fit investment. The tool allows the adviser to use their common sense, jump in and out of the process at any time and use their conversation skills with clients. At the same time, it gives a good indication of which portfolio might be more suited to a client's needs and risk appetite and the rationale which underpins that decision.

"We've had a number of firms trialling Investor Profiler for a while and it's nice to see so many commit straight away, with a steady stream still coming in, and we expect a lot more over the next 12 months. The statistics show that most of the firms who trial the system buy it, so we want to encourage more to give it a go."

Paul Resnik, co-founder of FinaMetrica, commented: "There's a revolution underway. Best-of-breed service chain integrations, just like this one between us, threesixty and over thirty multi-asset portfolio managers, make advisers' lives easier and their clients' lives richer. This collaboration shows advisers are now in the box seat; they no longer need to work with second rate services and tools provided by suppliers disinterested in adviser professionalism."

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About threesixty services

threesixty is a compliance and support business founded in 2003 and now wholly owned by Standard Life. The firm offers a three-pronged service for intermediaries: helping to ensure regulatory requirements are met; providing developmental support for businesses seeking growth, and assisting and advising business owners looking to realise the value in their businesses. Its compliance services include face-to-face audits, file checking, technical support and a helpdesk. Advice on marketing, fee modelling, business planning, recruitment, acquisition and exit strategies and client segmentation is offered to those wishing to develop their businesses, alongside a programme of seminars and outsource services such as product research. More information:
www.threesixtyservices.co.uk

About FinaMetrica

FinaMetrica specialises in risk tolerance and risk-related matters. The FinaMetrica risk profiling system is based on a psychometric test of personal financial risk tolerance. Psychometrics, a blend of psychology and statistics, is the scientific discipline for testing attributes such as risk tolerance. Launched in 1998, the system is now used by 5,500 advisors in 23 countries in seven languages. To date, more than 800,000 tests have been completed. The FinaMetrica system enables advisors to make valid and reliable assessments of their clients' risk tolerance, incorporate those assessments into the financial planning process and explain risk more meaningfully. More information:
www.riskprofiling.com.