



## **MEDIA RELEASE**

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## **FinaMetrica Launches Upgraded MoneyGuidePro® Risk Profiling Tool**

**Atlanta** (August 1, 2015) – FinaMetrica has released its upgraded MGP 2.0 risk profiling tool, which replaces the previous version (MGP 1.5) from August 1.

FinaMetrica's MGP 2.0 tool for MoneyGuidePro® offers major improvements including a reworking of the risk report to show personal and couple differences more clearly. It also enhances the Mapping process to better link risk tolerance scores to model portfolios and multi-asset portfolio solutions.

“Other improvements include the re-norming of the US database of completed tests and the reworking of the Risk & Return reports to eleven from seven portfolios and extension to 18 return 'story boards' designed to help advisors more effectively frame realistic investment expectations,” said FinaMetrica co-founder Paul Resnik.

“We have also enhanced our reporting which makes conversations with clients about their money and their goals more structured and rewarding,” said Mr Resnik.

“We believe we've now improved both compliance and collaboration and have a really workable balance between the two. We will be providing training webinars in the coming weeks to help users get the most out of their FinaMetricaPro subscriptions,” he said.

“There have been over 850,000 FinaMetrica risk tolerance tests completed to date and the stability of our risk tolerance scores have been proven through two major bear markets since our launch in 1998: the Internet bubble and global financial crisis. Subsequently, there has never been a FinaMetrica subscriber that we are aware of that has ever faced a suitability-related case in the US. Our tool helps to ensure best practice in the financial advice process,” he said.

MoneyGuidePro's Kevin Knull said “The upgraded FinaMetrica Version 2.0 will considerably improve the advisor/client experience while evaluating current risk tolerance. We are pleased FinaMetrica continues to innovate their risk profiling tools to help investors better understand risk, particularly given the current levels in the market.”

### About FinaMetrica

FinaMetrica specializes 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 850,000 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: <https://www.riskprofiling.com/>.

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