



CONTACT

Mark Locke
thelangcat
marklocke@langcatfinancial.com

Craig Burgess, EBI
<mailto:Craig@EBIP.co.uk>

FinaMetrica and EBI shake hands on risk profiling solution

Sydney/London: (August 3, 2015) – EBI, an emerging discretionary fund manager and FinaMetrica, the investment suitability specialists, have come together to assist independent financial advisers to reduce the frictions in investment advising.

The collaboration, which started on July 1, meets the needs of advisers with a passive and evidence orientated, investment preference focusing on goals-based life planning.

The deal brings FinaMetrica's four suitability consistencies: market tested scientific risk tolerance tests, evidence based mapping of risk scores to portfolios, standard language for describing risk and proven framing of investment expectations to EBI's rapidly growing community of 64 goals-oriented planning firms.

EBI runs a highly disciplined, low cost multi-asset and multi-manager portfolio suite of £485 million consisting of funds from a number of highly regarded international evidence-based investment houses.

"We've worked really hard with FinaMetrica to bring this link to fruition. I've always known that good advisers will take value from quality integrations. We hope to double our adviser members over the next three years on the back of this and similar alignments with quality service providers," said EBI's Craig Burgess.

This is the first time FinaMetrica has provided its full descriptor service to a UK fund manager. The descriptors deliver an extensive historical risk and return profile for each of EBI's 21 portfolios designed to take the surprises out of investments.

"We are simply delighted to be engaged in this ground breaking adventure with Craig and the EBI adviser community. This is a wonderful example of the integrated 'best-of-breed' back and front office systems that advisers will need to thrive in the years ahead," said FinaMetrica co-founder Paul Resnik.

EBI advisers enjoy strong professional and commercial relationships with several major platforms. They also access Voyant, a state-of-the-art financial intelligence presentation and collaboration platform. Voyant in turn links to a contemporary CRM.

Advisors are able to select an EBI fund that is consistent with their client's risk tolerance which can then be tested, through the Voyant platform, against the client's financial goals and risk capacity so as to arrive at a suitable recommendation.

Bob Freeman, Voyant's UK chief operating officer, said: "We've worked with EBI and FinaMetrica for several years. We know that advisers need a simple integrated tool set to more effectively run their businesses, build strong relationships with their clients and compete with robo advisers."

Duncan Orr, Swindells Financial Planning said: "We can't believe our good fortune. We searched out the best service providers we could find for our firm and now several of the most important organisations we discovered are working together to make our job easier."

[Click here for a full list of current mapped portfolios.](#)

About FinaMetrica

FinaMetrica specialises in risk tolerance and investment suitability 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: www.riskprofiling.com.

About EBI

EBI Portfolios is dedicated to bringing science, efficiency and innovation to investing. EBI provides evidence based investment management and supporting resources to a select group of the UK's most knowledgeable and forward-thinking financial advisors and their clients. With £485 million invested in EBI's portfolios, EBI is changing the way the UK invests. EBI provides a discretionary fund management service that gives advisors the opportunity to show added value to clients.

###