



MEDIA RELEASE

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FinaMetrica and Redtail Join Forces to offer simple best practice solution

Sydney, Australia (August 12, 2015) – FinaMetrica, the pre-eminent global provider of risk tolerance assessment tools, announced today an integration with Redtail Technology, a leading U.S. provider of client relationship management (CRM) systems for financial advisors.

The integration will allow advisors using the Redtail CRM to quickly and accurately assess a client's risk tolerance score via both FinaMetrica's 25 and new 12-question psychometric risk profilers. Redtail CRM users can launch FinaMetrica directly from a contact record from August 12th 2015. Joint webinar sessions will shortly be announced.

Redtail spokesperson Mario Canas said the deal with FinaMetrica "allows our mutual advisors the ability to streamline delivery of their risk profiling tools to clients as well as to monitor risk tolerance directly from Redtail CRM. The ability to simplify the delivery of Client Risk Assessments and sync data with Redtail CRM can only enhance conversations surrounding client suitability."

Tyler Nunnally, FinaMetrica's US Strategist, said that advisors will now be able to offer best practice risk profiling to their clients.

"We believe this integration will appeal to advisors and advisory networks seeking a valid, reliable and defensible suitability process. FinaMetrica has been at the forefront of risk profiling for almost 18 years. Our system has been tested and proven accurate through several market corrections by hundreds of the world's best financial advisors," he said.

"Our subscribers wanted us to integrate with other main stream service suppliers. This is the first through our new application program interface (API), which allows Redtail to link directly to FinaMetrica's website to synchronise client data. We are working on several other integrations which we will be announcing shortly."

Earlier this year, FinaMetrica unveiled a collaboration with portfolio stress tester RiXtrema and another with portfolio risk experts MacroRisk Analytics, which allows advisors to directly link their client FinaMetrica risk tolerance score to MacroRisk's portfolio risk scoring.

FinaMetrica also has integrations in place with MoneyGuidePro, Financelogix and IPSAdvisorPro.

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: <https://www.riskprofiling.com/>.

About Redtail Technology

Redtail Technology is a leading provider of web-based Client Relationship Management (CRM), paperless office, and email archiving solutions in the financial services industry. Easily affordable, easy to implement and offering integration with many of the industry's most widely used applications, Redtail is committed to providing financial advisors with the core technologies that drive their day-to-day operations. CRM is ultimately about not only acquiring and managing your clients and prospects – it's also about servicing them and, in turn, extracting value from the relationships. At the same time, it's about doing all of these things while simultaneously improving operational efficiency. Visit www.redtailtechnology.com for more information.

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