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FinaMetrica Drives Suitability in Macquarie's New Robo-Adviser

SYDNEY (November 19, 2015) – Macquarie Group has joined forces with FinaMetrica to use its risk profiling software for its new robo-adviser platform, OwnersAdvisory.

“The FinaMetrica and Macquarie collaboration enriches the value proposition of both parties. It enables FinaMetrica to deliver its market proven enterprise risk profiling consistencies to Macquarie's advisory customers,” said FinaMetrica co-founder Paul Resnik.

“It gives FinaMetrica's subscribers the opportunity to bring Macquarie's industrial strength portfolio efficiencies to the management of all their clients' financial assets.”

Mr Resnik said FinaMetrica has over the last 20 years helped hundreds of professional financial planning businesses around the world to scientifically assess the financial risk tolerance of their clients.

“With close to a million tests now complete, working with robo-advisers to match portfolios to the needs of clients is a natural extension of that experience,” he said.

“FinaMetrica's goal is to be the global preferred 'suitability heart' of quality robo advisers. The FinaMetrica Investor Profiler is already embedded in robo-advisers from a leading South African planning firm and a Swiss private bank, NBK Private Bank Switzerland (NBK). In the pipeline are further robo engagements in the US, the UK, Canada, Germany, India and Portugal.”

Mr Resnik said FinaMetrica's strategy is to accelerate software integrations with other market leading service providers to financial advisers and investment managers in the 20 countries in which it is active.

“Integrations are complete in the US, the UK and South Africa. Developments are underway in Australia, Germany, New Zealand and India. Canadian integrations include a multi-currency, multi-jurisdictional bank strength financial planning suite,” Mr Resnik said.

FinaMetrica has a flexible range of robo advice services which include complete suitability algorithm consultancy and implementation, white-labelling of existing robo models and risk test integrations into clients' algorithms.

FinaMetrica has just completed a review of over 60 robo advisers around the world. Copies of FinaMetrica's new groundbreaking report, *The Robo Revolution*, are available here. The report details

10 dramatic impacts of robo-advisers on the global financial planning industry and how traditional advisers can protect their market share against their onslaught.

The Macquarie robo-advice platform will offer customised advice in line with an investor's profile, goals and risks, across all standard asset classes – cash, fixed income, equities, commodities and alternatives. Macquarie's robo-adviser allows investors to execute trades and implement their advice with any existing financial product provider and to use existing accounts.

Importantly, the service offering uses FinaMetrica's market proven 12-question psychometric risk tolerance test.

About FinaMetrica

Advisors rely on FinaMetrica's award-winning risk profiling process to help clients stay invested and achieve their financial goals by delivering suitable investment advice. Launched in 1998 and proven through market cycles, FinaMetrica is used by thousands of leading advisors around the globe to scientifically assess their clients' risk tolerance, incorporate those assessments into the financial planning process and frame expectations more realistically. Almost a million FinaMetrica risk tolerance tests have been completed to date. For further details visit www.riskprofiling.com

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