



**NEWS RELEASE**

**23 February 2016**

## **FINAMETRICA WINS BEST RISK PROFILING SOLUTION AT THE WEALTHBRIEFING SWISS AWARDS 2016**

FinaMetrica has been crowned 'Best Risk Profiling Solution' at the 3<sup>rd</sup> **WealthBriefing Swiss Awards**. The glittering awards dinner was held at the Hotel President Wilson, Geneva.

Judges were impressed by a clear submission from FinaMetrica that showed a pragmatic and innovative approach and a superb database and analytical function.

FinaMetrica co-founder and director Paul Resnik said this is yet another milestone in the company's drive to be recognised as the pre-eminent global provider of risk tolerance tools and supporting services.

"We're delighted to be recognised by the **WealthBriefing Swiss Awards** for our risk profiling solution. Advisers tell us that getting risk tolerance right is critical to their clients remaining invested for the longer term. Risk tolerance tends to be fairly stable over an investor's lifetime. So taking it into account in investment decisions pays big dividends in reducing anxiety and emotional turmoil and loss of portfolio value," said Resnik. "We developed our test and risk communications over the last 21 years in conjunction with the most successful professional advisers and academics on the planet. It's great to have our joint work appreciated. It shows that good advice can be self-generated and needn't be imposed by regulation."

FinaMetrica regional alliance partner, Monika Müller, said: "One of FinaMetrica's great strengths is that while it assesses a universal personality trait in risk tolerance, the test does so taking into account cultural differences. The test, report, and historical risk and return guide have been translated to meet local needs in Switzerland, Germany and Austria. We are working with a growing number of banks, investment managers, financial advisers and software providers preparing to meet the impending MiFID2 suitability obligations."

**ClearView Financial Media's CEO, and Publisher of WealthBriefing, Stephen Harris, was first to extend his congratulations to all the winners. He said:** "The firms who triumphed in these awards are all worthy winners, and I would like to extend my heartiest congratulations. These awards were judged solely on the basis of entrants' submissions and their response to a number of specific questions, which had to be answered focusing on the client experience, not quantitative performance metrics. That is a unique, and I believe, compelling feature. These awards recognise the very best operators in the private client industry, with 'independence', 'integrity' and 'genuine insight' the watchwords of the judging process - such that the awards truly reflect excellence in wealth management."

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**NOTES TO EDITORS**

**1. 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](http://www.riskprofiling.com)

**2. About ClearView Financial Media Ltd ("ClearView")**

ClearView Financial Media was founded by Chief Executive, Stephen Harris in 2004, to provide high quality 'need to know' information for the discerning private client community. London-based, but with a truly global focus, ClearView publishes the *Family Wealth Report* group of newswires, along with research reports and newsletters, while also running a pan-global thought-leadership events programme.

With teams based in London, Singapore, Switzerland, South Africa and the Philippines, the company is one of the fastest-growing media groups serving the financial services sector.