

FINAMETRICA

About us

The FinaMetrica Risk Tolerance Toolkit was launched in 1998. It was developed and trialed in Australia over four years with the assistance of the University of New South Wales. It's now maintained with expertise from the London School of Economics, and has gained international recognition as world's best practice. The Toolkit's reliability and validity is backed by over a million uses by thousands of financial advisors in over 20 countries.

The Institute of Behavioral Finance (IBF) is an independent research and training South African institution aimed at the study and promotion of the behavioral finance discipline. Our mission is to add value and enhance the professional status of the investment sector in South Africa and in so doing serving the interests of financial planners and clients. The IBF has been appointed the exclusive distributor of the FinaMetrica Risk Profiling System in South Africa.

Value proposition

The FinaMetrica Risk Tolerance Toolkit™ helps advisors and enterprises create lifetime relationships, through better advice that results in clients who refer more, invest more and remain suitably invested through market highs and lows.

No matter why you are reviewing your risk tolerance testing, be it to meet ever changing regulatory obligations, better match investment recommendations to clients' needs or to improve communication with clients you will want to know that you are working with a market proven methodology backed by strong academic evidence.

If you need to:

- meet ever growing regulatory obligations
- acquire more clients
- add efficiency in your practice, delivering more value with less effort
- retain clients during good times and bad
- have happy fans refer you on because of the quality of your advice

Try the FinaMetrica Risk Tolerance Toolkit™ now to help you create lifetime partnerships by specifically matching client's risk tolerance to tailored investment advice. Give better advice and create clients that invest more, refer more, and stay clients for life.

Services offered

The FinaMetrica system is an online system consisting of the following:

- **FinaMetrica Risk Tolerance Questionnaire**
A psychometric test of personal financial risk tolerance offering previously unattainable levels of validity, reliability and accuracy in risk tolerance assessment. The FinaMetrica Risk Tolerance Questionnaire enhances the financial planning process.
- **FinaMetrica Risk Profile Report**
By clearly articulating the client's risk tolerance in terms that are meaningful to the financial planner and the client in an easily understandable report the FinaMetrica system empowers both financial planner and client.
- **FinaMetrica Linking Spreadsheet**
The FinaMetrica Linking Spreadsheet is a tool that enables the financial planner to objectively incorporate the client's risk tolerance scores into the process of selecting investment strategies. Selecting an investment strategy usually involves a trade-off between the client's:
 - Risk tolerance, and
 - Risk required to achieve financial and investment goals.
 Often, risk required exceeds risk tolerance. Financial planners must be able to identify this gap and guide the client in closing this gap whilst staying within the client's risk tolerance comfort zone. The FinaMetrica Linking Spreadsheet guides a financial planner on how to stay within the client's comfort levels on both the upside and downside regarding asset allocation in an investment portfolio, according to the client's risk tolerance score. FinaMetrica Risk and Return Guide
- **The FinaMetrica Risk and Return Guide**
provides financial planners with resources to enable best practice in educating clients about risk and return and managing clients' risk and return expectations. The FinaMetrica Risk and Return Guide enables the financial planner to link the client's FinaMetrica Risk Profile to the risk and return characteristics of investment portfolios in providing a unique illustration of downside volatility through analysis of historic falls in portfolio values.
- **Training and education**
The IBF will assist advisers with training on using the system and answer any queries they may have. The IBF will also educate advisers and clients on risk tolerance and other risk parameters.

Key individual

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Regions supported

The IBF is situated in Johannesburg. However, since the FinaMetrica system is online, telephonic support can be given throughout South Africa. Should a group of advisers require training in the main centres of SA it could be organised.

Reference and pricing

To qualify for the preferred rate or service enhancement, please quote the following reference.

Quote reference: Allan Gray Adviser Services
Pricing: Discount of 20%