WHAT DRIVES FINANCIAL SUCCESS?

CLIENT MONEY MINDSET

Add the power of behavioral assessments to your practice with **DataPoints.**

Backed by 40+ years of data based on *The Millionaire Next Door*, our insights provide advisors with a clear roadmap to help clients avoid behavioral challenges to achieving financial success.

DataPoints is your partner in the psychology of financial planning.

#1 Understand Money Attitudes

Know how your clients feel about budgeting, investing, and giving at the start of your relationship. Use insights as a communication guide, and set the stage for client retention.

#2 Compare Household Profiles

Getting couples on the same page is critical for economic success. Prepare for meetings with couples by reviewing areas of money agreement (and disagreement) using assessments.

#3 Improve Investing Competencies

Measure psychological risk tolerance to see a clear picture of your client's investing mindset. Identify which clients may be prone to biases.

#4 Help Clients Avoid Behavioral Pitfalls

Understand your client's unique money-related experiences and beliefs. Use personalized reports to help clients avoid behavioral pitfalls.

#5 Guide & Coach Clients

Use assessment results to provide personalized recommendations back to clients on how they can improve saving, spending, and investing decisions.

[Try it free for two weeks: **datapoints.com/**](https://datapoints.com/)

DataPoints

4880 Lower Roswell Road, Suite 165, #134 • Marietta, Georgia, 30068
www.datapoints.com

ADD DATAPOINTS TO UNDERSTAND CLIENT

MONEY MINDSET

Branded, personalized reports for your clients

Client finpsych insights to guide conversations

Track & monitor change over time

Let's work together.

Assessments Based on 40+ Years of Data & Research	DataPoints Plus	DataPoints Toolkit	Money Scripts Powered by DataPoints
Building Wealth Guide clients to achieve financial success based on *The Millionaire Next Door.*	✓	✓	
Investor Profile Assess psychological risk tolerance and understand composure, attitudes, and confidence.	✓	✓	
Financial Perspectives Measure money attitudes. Compare results within households and over time.	✓	✓	
Engage Marketing Assessments Add short quizzes as calls-to-action on your site.	✓	✓	
Klontz Money Scripts Inventory-R Assess underlying money beliefs. Use results to guide conversations and coach.	✓		✓
Financial Health Scale Get a quick indication of money-related health. Use results to follow up.	✓		✓
Per Advisor /Month	$120	$80	$60

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