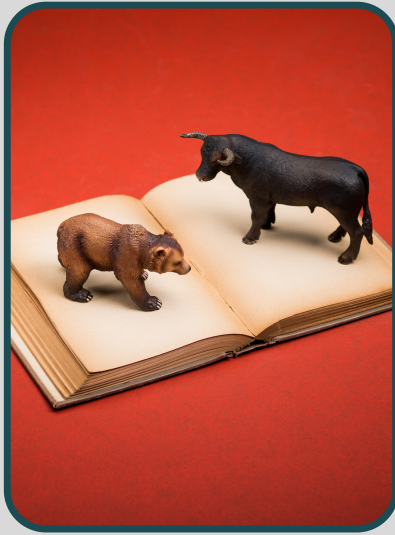


# A BETTER WAY TO ASSESS RISK TOLERANCE

# INVESTOR PROFILE



## IMPLEMENT AN RTQ BUILT WITH THE CLIENT IN MIND

Assessing the client's risk tolerance is a critical step in investment management. So **why do most risk tolerance questionnaires lead to a less-than-ideal client experience?**

What if you provided a different experience to your clients? What if you could implement an RTQ that was easy for clients to complete, easy for them to understand, and provides you with invaluable insights into your client's investing-related characteristics?

The Investor Profile assessment from DataPoints is here. This comprehensive assessment of psychological risk tolerance is client-focused, backed by science, and most importantly, helps you guide clients towards financial success as a result of improved investing decisions.

## A SCIENTIFIC PROCESS THAT'S EASY TO IMPLEMENT

### 1. INVITE CLIENTS

Invite clients directly through the DataPoints platform, or automatically via integration or an embedded button on your client portal.

### 2. REVIEW & PREPARE

Review detailed psychometric results. Use results as a starting point for portfolio allocation decisions. Prepare an ongoing client communication and education strategy based on detailed behavioral insights.

### 3. IMPLEMENT RESULTS

Share the personalized, client-facing report with clients. Follow up with open-ended questions to gain a deeper understanding of investing related choices and anticipate potential pitfalls. Guide clients toward better investing decisions.

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



**Guide clients around investing-related behavioral pitfalls and toward financial success with the Investor Profile.**

## The Details

- Appropriate for all client types
- Maps to portfolio allocation ranges
- A technical report outlining test reliability & validity
- Compare couples' scores side-by-side
- Advisor and client reports, household comparison charts, behavioral coaching & planning
- Approximately 50 questions
- Takes 8-12 minutes to complete
- Measures psychological risk tolerance, including Investor Confidence, Judgment, Volatility Tolerance, Risk Preference, and Risk Personality