PredictingWealth

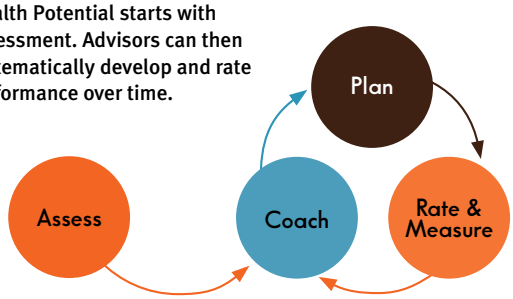
Analytics for Wealth Potential

Your firm's success largely depends on how you demonstrate value to your clients' wealth trajectory. Data Points can help you remain vital to their wealth-building journey by identifying and developing their Wealth Potential. The Predicting Wealth System from Data Points scientifically links real-life experiences and behaviors to the ability to build wealth.

Identify, Predict, and Retain with Predicting Wealth

The Predicting Wealth system enables your firm to identify at the start of your relationship those who can build wealth. The Data Points Solution acts as a digital financial mentor for clients and advisors, making them and you more successful. With behavioral-based assessments, clients who may not demonstrate potential today can be coached to improve in areas that are critical for building wealth over time. Data Points' assessments can reveal which clients are likely to stick with your advisors through any market. We examine key factors that predict client loyalty and the likelihood that clients will endorse your firm in the future.

Effectively coaching and developing Wealth Potential starts with assessment. Advisors can then systematically develop and rate performance over time.



How It Works — A Hosted Solution for Powerful Wealth Analytics

The Predicting Wealth system from Data Points gives firms a powerful view into the behaviors and potential of your clients. Our patent-pending technology delivers electronic assessments and performs analysis, then generates feedback and categorization data that benefits clients, advisors, administrators and executives. The critical components of the Predicting Wealth system include:

- Wealth Potential assessments
- A customizable dashboard
- The Data Points analysis engine and data repository

As a software and service product, the Predicting Wealth system integrates with your technology platform in a variety of ways. For example, you can offer individual clients access to our assessment or make it available to a broader audience from your webpage.

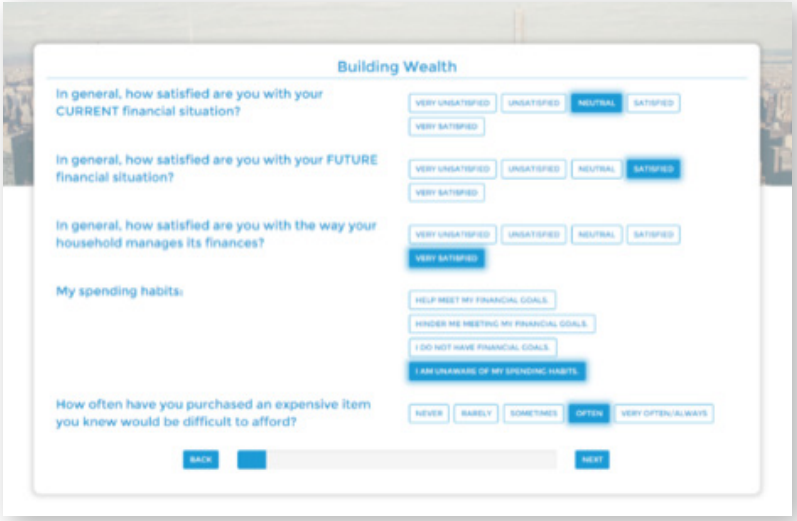
THE SCIENCE OF PREDICTING WEALTH

Data Points' assessments of Wealth Potential were developed scientifically from a behavioral model of personal financial management based on research on the affluent in the United States conducted by *The Millionaire Next Door* author and researcher, Dr. Thomas J. Stanley. This proprietary model is based on nearly 40 years of data from more than 500 interviews and focus groups and 14,000+ surveys of high and ultra-high net worth individuals, as well as empirical studies that are continually conducted today.

Assess

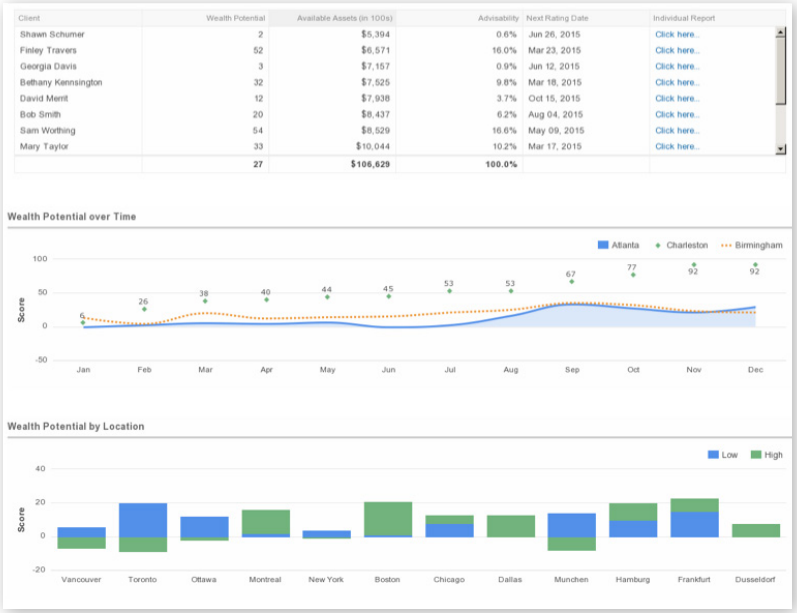
With just a simple login, clients and potential clients can begin one of the assessments on Predicting Wealth.

During a brief, ten-minute assessment, respondents complete a series of questions about their financial behaviors, habits and life experiences. Experts in behavioral science have analyzed and designed each question to correlate to wealth-building potential. At set intervals following the first assessment, clients are asked to quickly rate their performance on several Wealth Factors, creating a meaningful analysis of how your coaching and advice has impacted their behaviors and helped them to improve. Data Points experts can tailor assessments to capture the data your firm needs most.



Analyze

Once the assessment is complete, the Data Points analysis engine reviews the responses, comparing them against normative data. Clients receive wealth factor scores and an overall score from the Predicting Wealth system, as well as a descriptive interpretation of the client's scores along with recommendations for improving or maintaining success in specific areas. The system will analyze all follow-up assessment results, providing an ongoing understanding of an individual's Wealth Potential.



Client	Wealth Potential	Available Assets (in 100s)	Advisability	Next Rating Date	Individual Report
Shawn Schumer	2	$5,394	0.6%	Jun 26, 2015	Click here...
Finley Travers	52	$6,571	16.0%	Mar 23, 2015	Click here...
Georgia Davis	3	$7,157	0.9%	Jun 12, 2015	Click here...
Bethany Kennsington	32	$7,525	9.8%	Mar 18, 2015	Click here...
David Merrit	12	$7,938	3.7%	Oct 15, 2015	Click here...
Bob Smith	20	$8,437	6.2%	Aug 04, 2015	Click here...
Sam Worthing	54	$8,529	16.6%	May 09, 2015	Click here...
Mary Taylor	33	$10,044	10.2%	Mar 17, 2015	Click here...
	27	$106,629	100.0%		

Wealth Analytics

A powerful dashboard allows you and your clients to view individual Wealth Potential scores and personalized recommendations for improving the ability to build wealth. It is customizable so your advisors can view and compare client data in a variety of ways, then automate performance measurement and monitoring. Your administrators can set reminders, send out assessments and configure how client data is shared. Executives can use the dashboard to gain insight into high wealth potential clients by region, office or advisor.

Working with Data Points

Ready to assess the Wealth Potential of your prospective and current clients? Data Points works with you to determine the best solution for your business. From our easy to use Predicting Wealth system with assessments to our custom designed tests specifically targeting characteristics that matter to your business, our behavioral science experts can help you uncover the most effective ways to assess your clients' Wealth Potential and more.

Let's get started.

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