

Engage Prospective Clients with DataPoints



Differentiate Your Lead Generation

You've demonstrated your unique approach to clients through your marketing content and brand: can you distinguish your lead generation, too?

DataPoints gives advisors a way to brand their visitor experience through a library of scientifically-created, engaging assessments that give something back to the visitor: valuable insights and a picture into the kinds of client experience you offer as a holistic advisor.

Tailor the Client Experience

Choose from a library of assessments that complement your focus, embed DataPoints' assessments into your website, and generate leads from individuals seeking to learn about their wealth behaviors.

Spending Does your practice include a focus on the basics: helping your clients understand how consumption behavior can impact their overall financial success? Embed the Spending assessment on your homepage as a way for visitors to learn how their own behaviors may be impacting their financial success.

Career Fit Do you focus on career change, satisfaction, and fit or specialize in clients who are in their mid-career stage or those who are making career changes? DataPoints' Career Congruence test assesses career fit, and shows visitors how finding congruence in their job and career can impact financial success.

Wealth Potential DataPoints' Wealth Potential assessment helps visitors get a snapshot of their potential to build wealth over time, based on 40+ years of research that fueled *The Millionaire Next Door*. Results help visitors understand the importance of financial planning and guidance.

Built on Science & Data

We build our assessments using the science of predicting wealth. We utilize life experiences, behavioral factors, and attitudes uncovered through nearly 40 years of research on the wealthy that fueled *The Millionaire Next Door* and *The Millionaire Mind*, add predictive analytics, and give advisors a way to create a personalized experience for current and prospective clients that are meaningful.

DataPoints' first-of-its-kind behavioral science platform blends segmented, objective data and psychology to enhance wealth building guidance, confidence, and outcomes. Contact us at sales@datapoints.com to get started.

