

Advise: Financial Perspectives



Gain Insights Into Client Financial Attitudes

Does your client on-boarding process take you from introduction to deep understanding quickly?

Each of us has a unique set of attitudes and values related to financial matters. Understanding these characteristics can help advisors to develop strong relationships with their clients, and to make sound financial decisions that are consistent with the financial outlook.

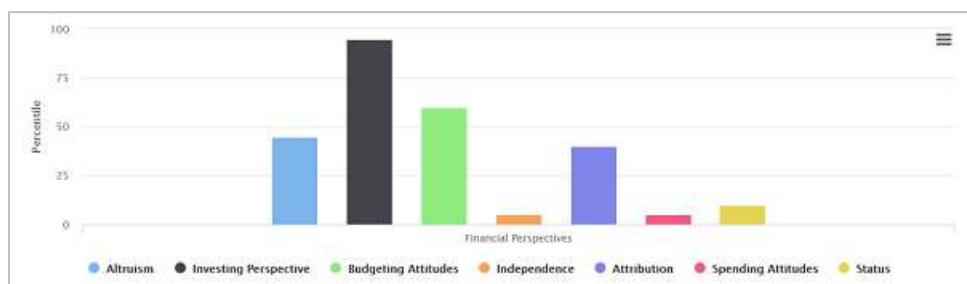
The Financial Perspectives assessment is designed to allow you to accelerate your understanding your client's views on critical areas related to finances. Use the Financial Perspectives assessment before or in conjunction with your first meetings to quickly understand your clients' outlook and attitudes about key financial areas ranging from investing to budgeting to consumption.

Using data from 40 years of research on the wealthy, research that fueled *The Millionaire Next Door*, DataPoints offers advisors psychometrically-sound, robust measures of client characteristics. The Financial Perspectives assessment asks clients about their opinions, attitudes, and perspective on seven different areas of finance. Clients receive a personalized report that includes scores and interpretative feedback, while advisors receive a guided report to help clients understand how their perspective could impact their financial success. The DataPoints platform provides advisor- and firm-wide data views and comparison tools to demonstrate differences and similarities in scores for couples or any other group.

Assess & Understand...Then Advise

Begin your advisor-client relationship with a clear picture of your client's money views. Financial Perspectives measures seven areas that will give you an insightful picture of your client's attitudes in areas such as:

Status & Spending Your client's attitudes regarding demonstrating status to others; perspectives on spending and shopping.



DataPoints provides deep insights to strengthen client relationships.

Giving Back The importance of and value your clients place on altruism and charity.

Investing Your client's view on long-term investment strategies that can impact investing success.

Add Objectivity To Your Relationships

Wealth and money are personal. Data is objective. We believe both are important to establishing a foundation of trust. By marrying the individualized nature of psychology and the black-and-white value of analytics, you can use these unique insights that give each person confidence in their ability to accomplish their vision for prosperity.

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