

Behaviors Drive Wealth



Behavioral Change: The Next Frontier of Financial Planning

Investment portfolio management is quickly becoming a commodity in the financial advisory space. Behavioral change is the next frontier where advisors will prove their unique value to their clients. Our tools help advisors maximize their clients' wealth-building results by automating the assessment and analysis of critical wealth-building behaviors and psychology.

Our tools combine life experiences and behavioral factors uncovered through 40 years of research on the wealthy, which fueled *The Millionaire Next Door* and *The Millionaire Mind*, with assessment and predictive analytics. This approach is cutting edge for professionals who focus on behavioral change with their clients.

Generate Leads & Demonstrate A Holistic Approach

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

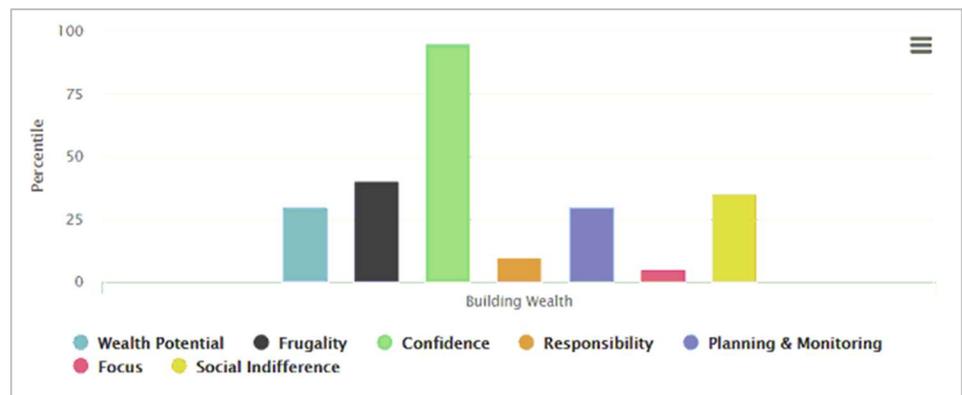
Choose from a library of assessments that complement your focus, embed DataPoints' assessments into your website, and generate leads from individuals seeking to learn about their wealth behaviors. Our library includes measures of: Spending Behaviors, Career Fit, Wealth Potential, Financial Planning, and Investor Composure.

Assess & Impact Client Financial Success

Building Wealth Assessment

The Building Wealth assessment provides a unique client experience that allows for a deeper understanding of the behavior patterns that impact money-related outcomes. Clients respond to questions about saving, investing, and spending, as well as other critical psychological and behavioral areas that impact their financial success.

The personalized reporting helps demonstrate how working with an advisor can impact those behaviors for the better, and serves to strengthen the relationship with clients.



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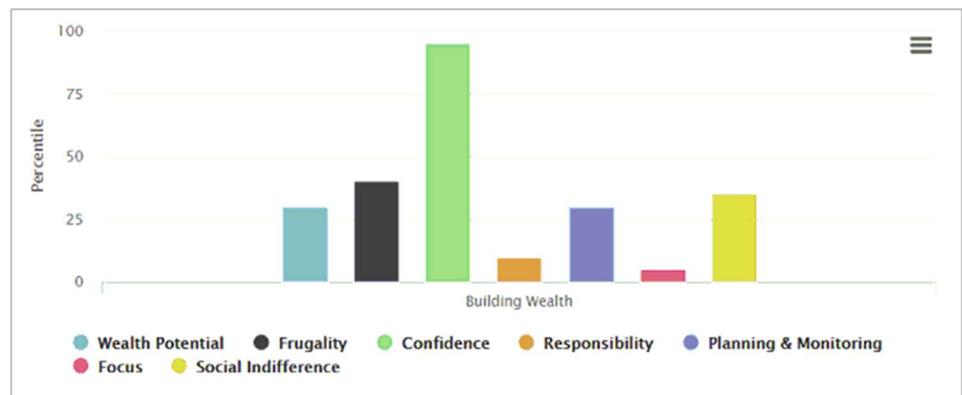
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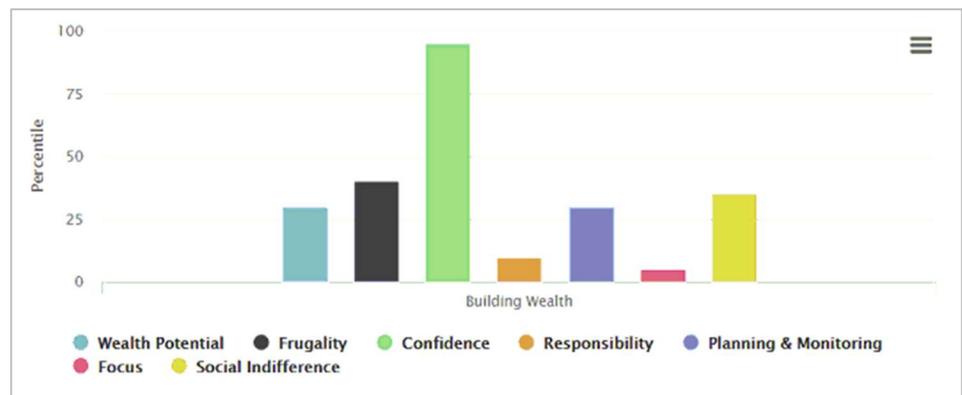
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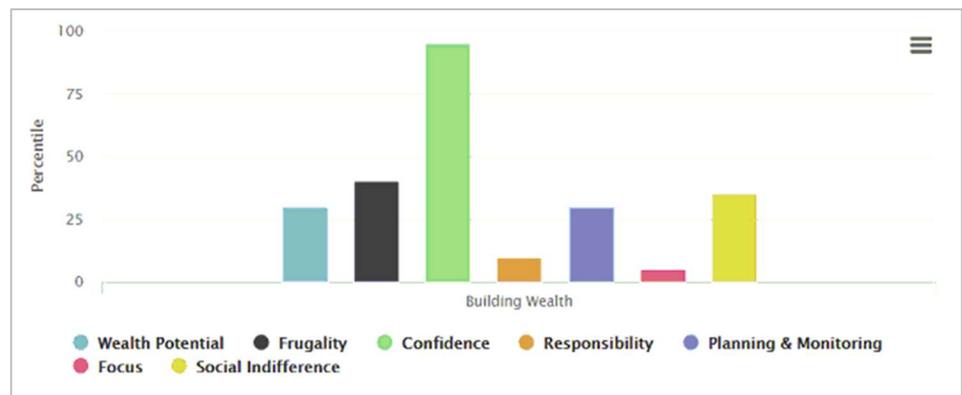
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