



# Behaviors Drive Wealth

## Manage the Behavioral Side of Your Practice with DataPoints

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, research that fueled *The Millionaire Next Door* and *The Millionaire Mind*, with assessments and predictive analytics. With DataPoints tools, advisors can manage and build the behavioral side of their practices.

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## Generate Leads & Demonstrate A Holistic Approach

Increase leads from visitors to your website with a library of scientifically valid yet engaging assessments that offer personalized insights to the visitor and a preview of the kind of client experience you provide.

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.

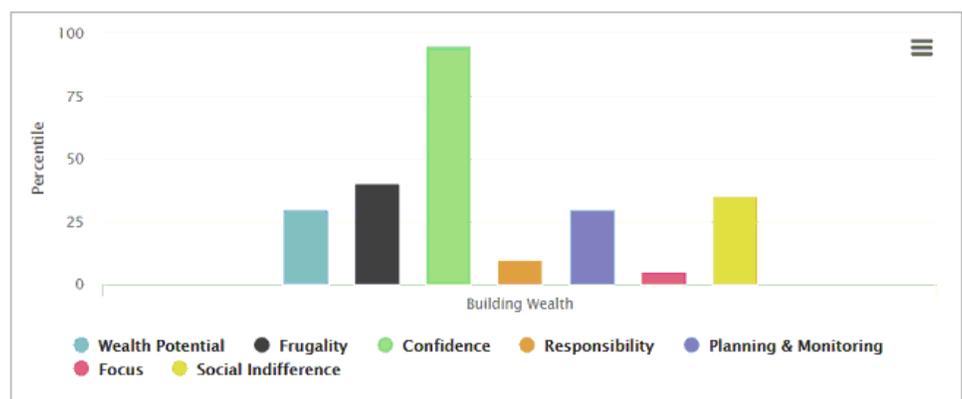
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## Assess & Impact Client Financial Success

### 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 areas that impact their long-term financial success.

Use Building Wealth with prospects or new clients to identify and guide better financial behaviors. Personalized reporting helps demonstrate how working with an advisor can impact those behaviors for the better, and serves to strengthen client relationships.



## Financial Perspectives Assessment

The Financial Perspectives assessment is designed to accelerate understanding of your client's attitudes and outlook related to seven areas in money and finance. 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 and status-seeking.

Begin your advisor-client relationship with a clear picture of your client's money attitudes. Financial Perspectives measures seven areas that will give you an insightful picture of your client's attitudes in areas such as spending, investment outlook, and financial independence.

## Investor Profile: Assess Risk Tolerance & Guide Behaviors

How does financial savviness, experiences with risk, and patterns of behaviors during volatile markets affect your clients' ability to adhere to an investment management strategy? What if you could know these characteristics about your prospective and current clients *before* a dramatic change in their financial situation, the markets, or the financial environment in general?

The Investor Profile assessment gives you and your clients a comprehensive picture of client reactions, behaviors, and personality in investment-related decisions and market volatility. It is a psychometrically sound measure of psychological risk-tolerance and can be used with new and experienced investors. In addition to providing portfolio mappings based on data from the Financial Planning Performance lab, the Investor Profile assessment measures five distinct wealth factors that impact client decision-making: Risk Preference, Investor Confidence, Volatility Composure, Investor Judgment, and Risk Personality.

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## Create Plans for Behavioral Change

Assessment is just the first step. Action is then required. Create customized coaching and development plans for your clients, focusing on the key behavioral areas that are holding your clients back. Automatically check in to track their improvements over time, and engage clients in an ongoing effort to improve financial behaviors.



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## Be More

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. Add the power of behavioral assessment to your practice, going beyond investment advice and shaping a holistic, life-long approach to wealth for your clients and their families. Contact us at [contact@datapoints.com](mailto:contact@datapoints.com) to get started.