



## PRESS RELEASE

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### VOYANT/FINAMETRICA ALLIANCE SETS NEW BAR FOR QUALITY OF ADVICE

Leading financial planning application suppliers, **Voyant** and **FinaMetrica**, today announced an alliance to provide financial planners and wealth managers with the ultimate, best of breed financial planning and risk profiling platform.

FinaMetrica's psychometric risk profiling methodology has now been fully integrated with the *Voyant Adviser* financial planning platform, providing advisers and wealth management groups with immediate access to a well tested, sophisticated and scalable enterprise solution. The joint venture will enable advisers and advisory businesses to rapidly bring to market a well differentiated value proposition.

The new integrated platform is designed to ensure both IFAs and larger advisory groups can meet all the new 'Suitability' and RDR regulatory requirements. Advisers will be able to engage clients in a rich discussion taking account of their risk tolerances, capacity for loss, and other key objectives in a quick, accurate and highly visual manner.

Paul Resnik, CEO of FinaMetrica, explains:

"FinaMetrica is a single focus business with a detailed understanding of the role of risk tolerance in the investment advising process. Voyant is a terrific partner. They deliver a powerful client-focused financial planning solution which is already the favourite of many UK IFAs and wealth management groups. Rather than the common 'lip service' integration which many technology companies profess to, this integration is comprehensive and has been brought together by the best minds in the business."

Bob Freeman, vice president of Voyant UK, explains:

“We are delighted to announce this new collaboration with FinaMetrica and jointly bring our best of breed solutions to the UK market. Advisers, facing growing regulatory, RDR and TCF requirements, will now have the ability to give their clients the ultimate in independent risk profiling and highly personalised financial plans”

“The joint solution has application both to advisers currently providing and those moving to offer fee-based advice under the new RDR regime. The integration will give UK based advisers immediate access to a comprehensive and holistic financial planning solution.”

**Voyant** is a leading supplier of financial intelligence presentation and collaboration platforms which simplify financial needs assessments and planning processes between advisers and their clients. *Voyant Adviser* has seen unprecedented growth across its UK IFA channel since launch. Voyant UK is a wholly-owned subsidiary of Voyant Inc. which is headquartered in Austin, Texas.

**FinaMetrica** helps manufacturers of investment products and investment advisors to better match investments to investor’s needs. Since launch in 1998 FinaMetrica has completed more than 400,000 profiles for over 3,000 investment advisers in 13 countries. FinaMetrica’s subscribers’ advise on more than £18 billion of clients’ assets. FinaMetrica is based in Sydney, Australia.

Paul Resnik of FinaMetrica continues:

“Our clients typically have been high-end IFAs and private banks. More recently we have been engaged with larger advisory businesses, mainstream banks, research houses, life companies, fund managers, stockbrokers, and their service suppliers. We are currently working with several organisations moving to a client-centred advice model in the light of what was learned through the 2008/9 market turmoil and the more robust regulatory obligations on advice that have followed.

“We expect a number of fund managers, research houses and other service suppliers to join the Voyant/FinaMetrica integration over the coming months as the pressure grows to quickly modernise business processes to provide integrated solutions which meet regulatory requirements.”

To find out more about Voyant Adviser and FinaMetrica advisers can visit [www.planwithvoyant.co.uk](http://www.planwithvoyant.co.uk) or [www.riskprofiling.com](http://www.riskprofiling.com)

**ENDS**

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#### **About Voyant UK**

Voyant is a leading supplier of financial intelligence presentation and collaboration platforms which simplify financial needs assessments and planning processes between advisers and their clients. Released in June 2009, Voyant Adviser has seen unprecedented growth its UK IFA channel.

Hundreds of advisers from some of the countries most reputable firms rely on Voyant Adviser to develop in depth financial plans and provide piece of mind to their clients.

Established in November 2008 Voyant UK is a wholly-owned subsidiary of Voyant Inc. Voyant, Inc. is headquartered in Austin, Texas.

For more information visit: [www.planwithvoyant.co.uk](http://www.planwithvoyant.co.uk)

#### **About FinaMetrica**

FinaMetrica enables advisers to better match investments to their clients' needs. Our goals are to help advisers boost productivity, enhance client satisfaction, improve regulatory compliance and increase investment persistency.

Since commercialisation in 1998 we have completed more than 400,000 profiles for over 3,000 leading edge investment advisers in 13 countries. In the average month we undertake 5,000 profiles and have completed up to 15,000 in one month. On average our subscribers stay with us for over 5 years. UK clients include a broad cross section of the UKs leading advisers and groups.

FinaMetrica subscribers direct more than £18 billion in conjunction with their clients. The majority of our activities are in the US, UK and Australia. We have been translated into 7 languages, most recently simple Chinese and Afrikaans.

Our solutions differ from alternative profilers in that we work from the investor's perspective to:

- deliver an independent and psychometric financial risk tolerance assessment tool set and planning methodology
- link the risk tolerance score to a range of investment recommendations, and

- promote investors' realistic investment expectations by effectively explaining the real financial risk and volatility in those recommendations.

Smaller advisory groups and individual advisers can access our web site to undertake a risk tolerance assessment. For larger groups our technology easily and quickly links into contemporary financial planning software to deliver a seamless process from investor needs to investment implementation.

**FinaMetrica Pty Limited**

[www.riskprofiling.com](http://www.riskprofiling.com)

[www.FinaMetrica.com](http://www.FinaMetrica.com)

[www.myrisktolerance.com](http://www.myrisktolerance.com)