

PRESS RELEASE

Xx April 2011

FINAMETRICA ANNOUNCES MORNINGSTAR INTEGRATION

UK clients of **Morningstar** and **FinaMetrica** will soon be able to link the risk scores from FinaMetrica's best practice psychometric risk tolerance test to Morningstar's optimised model portfolios.

This will provide clients of both companies with a robust methodology to match the needs of investors to their investments, which has become an imperative for advisory businesses in the light of the FSA's recent guidance paper on suitability.

Morningstar spokesman, xxx xxx commented:

"We are pleased to make this new service available to our current clients and equally to welcome FinaMetrica's subscribers, who are not already clients, to see the benefits of..."

Paul Resnik, co-founder of FinaMetrica explains:

"We are simply delighted with this development. We have been working hard to give our client's access to 'turn-key' investment advising solutions. This integration compliments our current partnerships with *Plan Plus* and *Voyant*, both of whom also have links with Morningstar's data. Advisers need to hold meaningful conversations with their clients around issues beyond investment performance and these links go a long way to creating 'readymade'

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.

To find out more about FinaMetrica, advisers can visit www.riskprofiling.com

ENDS

For further information please contact:

Paul Resnik, CEO, Cofounder & Director, FinaMetrica

+ 61 2 8668 9272 (direct Aus) or + 61 4 11 03 99 59 (mobile Aus)

paul.resnik (skype) paul.resnik@finametrica.com

Nicola Mitchell, Mitchell Money Penny

01242 703266

nicola@mitchellmoneypenny.com

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

www.FinaMetrica.com

www.myrisktolerance.com