

MEASURE MONEY ATTITUDES WITH FINANCIAL PERSPECTIVES



KNOW YOUR CLIENT'S MINDSET FROM THE START

Each client has a unique money mindset, a unique set of attitudes about financial planning, personal finance, and money in general.

Uncover client perspectives and personalize your communication, engagement, and ongoing advice based on each client's set of factors. Use the results to compare outlook over time or to understand couple alignment.

Imagine understanding **a client's money attitudes at the beginning of your engagement**. With the Financial Perspectives assessment, you'll be equipped to communicate effectively with clients from Day 1, no matter their outlook.

A SIMPLE PROCESS WITH SCIENCE BEHIND IT

Understanding client mindset can be challenging, but DataPoints makes it easy with the science of psychometrics and technology that's simple to implement.

1. INVITE CLIENTS

As part of your onboarding process, invite your new client to complete the short assessment.

2. REVIEW & PREPARE

Review the report to get detailed insights into your client's money attitudes. Use these insights to customize your plan based on the client's profile.

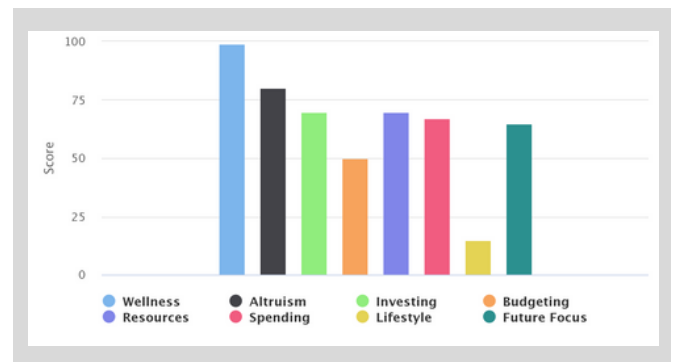
3. DELIVER A GREAT CLIENT EXPERIENCE

Tailor your ongoing conversations around your client's unique attitudes. Use the detailed results to tailor ongoing communication to your client based on their money mindset profile.

Try it free for two weeks
datapoints.com/start

The Details

- Branded for your firm
- Includes client- and advisor-facing reports, follow up interview questions
- Appropriate for all client types
- Approximately 55 questions
- Takes 8-10 minutes to respond
- Measures attitudes including:
 - Financial wellness
 - Altruism
 - Investing



Get detailed insights about your client's attitudes with the Financial Perspectives assessment.