# The Investor Profile

DataPoints®

## Past Behaviors & Experiences Can Impact Decisions Today

Our confidence, experiences with risk, and patterns of behaviors: all of these can impact our ability to adhere to an investment management strategy. How can you align your unique characteristics with the best allocation of your portfolio? How can you learn what areas of behavior you can improve to lead to more successful investing?

By taking the Investor Profile assessment, you'll receive a comprehensive picture of your risk psychology, behaviors, and personality in investment-related decisions and market volatility. With its unique focus on behavioral patterns, preferences, and attitudes, the Investor Profile is the scientific answer to understanding your psychological risk tolerance.

To get started, you'll receive an invitation to complete the short (8-12 minute) assessment. You'll be asked questions and read statements on topics covering experiences with investing; financial decisions you've made in the past; and demographic questions related to investments, and other personal characteristics. Your results will only be shared with your advisor.

| Profile Factor | Description |
|---|---|
| Investing Confidence | Confidence & self-efficacy in investment decision-making |
| Volatility Composure | Behaviors & experiences during times of market ups and downs |
| Risk Personality | Personality related to trying new ways of approaching problems or taking chances |
| Risk Preference | Preference for certain types of investments |
| Judgment | Knowledge/outlook related to sound investing principles |

After you complete the assessment, you'll receive a personalized report explaining how your behaviors relate to different aspects of investing. The report will give you information about each factor measured by the assessment.

## Why Take the Investor Profile?

Research has demonstrated that there is a relationship between certain behaviors and financial success over time. By assessing your wealth behaviors, you and your advisor can work together to improve and maintain those behaviors that will ensure a greater chance of financial success in the future.

You and your advisor will use the report to:

- Determine your level of psychological risk tolerance and how others with similar scores were invested
- Identify your unique patterns of investment-related characteristics and what they mean for investment success
- Create a personalized action plan to help you enhance or maintain effective investment related behaviors


*The Investor Profile is a scientific measure of your psychological risk tolerance*

**Questions**? Please contact your advisor or email DataPoints at research@datapoints.com.