

# Behaviors Drive Wealth

## Behavioral Change: The Next Frontier of Financial Planning



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, which fueled *The Millionaire Next Door* and *The Millionaire Mind*, with assessment and predictive analytics. This approach is cutting edge for professionals who focus on behavioral change with their clients.

## Generate Leads & Demonstrate A Holistic Approach

DataPoints gives advisors a way to brand their visitor experience through a library of scientifically valid yet engaging assessments that give something back to the visitor: valuable insights and a look into the kinds of client experience you offer as a holistic advisor.

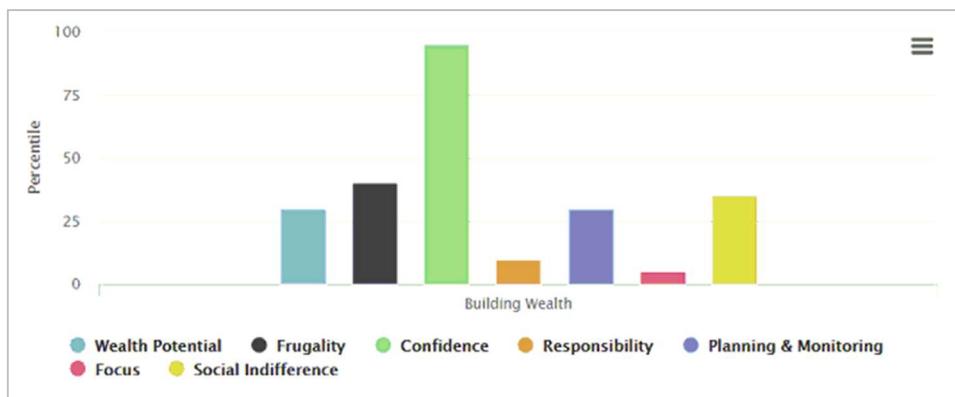
Choose from a library of assessments that complement your focus, embed DataPoints' assessments into your website, and generate leads from individuals seeking to learn about their wealth behaviors. Our library includes measures of: Spending Behaviors, Career Fit, Wealth Potential, Financial Planning, and Investor Composure.

## 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 and behavioral areas that impact their financial success.

The personalized reporting helps demonstrate how working with an advisor can impact those behaviors for the better, and serves to strengthen the relationship with clients.



## Financial Perspectives Assessment

The Financial Perspectives assessment is designed to allow you to accelerate your understanding your client's views on critical psychological and behavioral areas related to 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.

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

## Investor Profile Assessment (Beta)

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. The beta version measures four areas that are commonly associated with "risk," volatility, and investment decisions, and is designed to be used as a comprehensive risk-tolerance assessment. The Investor Profile assessment measures four distinct wealth factors that impact client decision-making: Financial Acumen, Risk Composure, Risk Preferences, and Risk Personality.

## 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.



## 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 [sales@datapoints.com](mailto:sales@datapoints.com) to get started.