

NEWS

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FinaMetrica Hires Impact Communications to Help Expand U.S. Presence

Firm's Risk Profiling Software Unique in Industry

Sydney, Australia (April 29, 2009) – Geoff Davey, co-founder of FinaMetrica®, today announced that the firm has hired Impact Communications to help them expand their presence in the U.S. market. “Accurately assessing a client’s risk tolerance has always been an essential element of an effective financial plan,” says Davey. “In today’s environment, it is even more important for advisors and their clients to have a clear understanding of the client’s risk profile.”

FinaMetrica was designed to be a low cost, quick and user-friendly way for advisors to gain a more insightful understanding of clients' financial attitudes, values, motivations preferences and experiences, and to meet duty-of-care obligations. FinaMetrica's focus is on the psychological factors relevant to financial decision-making in terms that are meaningful to individuals and their advisors. Developed and tested in Australia for more than four years, with the assistance of the University of New South Wales' Applied Psychology Unit, the FinaMetrica system has gained international recognition as a best practice since its Australian launch in 1998. The FinaMetrica system offers previously unattainable levels of validity, reliability and accuracy in risk tolerance assessment.

“Many advisors are using risk tolerance questionnaires that do not produce an adequate test of risk tolerance,” observes Davey. “Mismanagement of clients’ risk tolerance is still the Achilles heel of the financial advisory industry. Many client files contain ticking time bombs that could compromise the client’s financial situation and destroy an advisor’s reputation. Our system can protect both advisor and client.”

About Geoff Davey and FinaMetrica

Geoff Davey has an international reputation for expertise in risk tolerance and its role in the financial planning process. Geoff has been an invited speaker on these topics at financial planning conferences in Australia, the US, UK, NZ, Canada and Malaysia. He authored the chapter "Assessing Risk Tolerance: A Micro-Behavioural Finance Case Study" in the Bloomberg US book The Investment Think Tank: Theory, Strategy and Practice For Advisers. He co-wrote “Insights on Measuring Risk Tolerance from Psychology and Psychometrics” published

in the March 2005 edition of the *Journal of Financial Planning*, which focuses on the use of questionnaires in assessing risk tolerance. It introduces and illustrates basic concepts of good measurement principles and demonstrates where industry-standard questionnaires fail to measure up. Geoff has written numerous white papers, which can be found at www.risk-profiling.com. He directs FinaMetrica's ongoing research activities and relationships with academic and research institutions.

Prior to FinaMetrica, Geoff was a pioneer of financial planning in Australia. The firm he founded in 1972 was amongst the first to offer a financial planning service. By the time Geoff sold out to his five partners in 1989, the firm had 100 staff in Sydney, Brisbane and Melbourne and was widely acknowledged as being an industry leader.

Geoff is a member of the Australian Financial Planning Association and an international member of the US Financial Planning Association.

About Impact Communications, Inc.

Founded by industry veteran Marie Swift in 1993, Impact Communications specializes in developing effective client communications and marketing strategies for a select group of highly successful financial advisors and allied institutions. Widely respected as a marketing professional with a loyal following, Swift, along with her team, works with independent advisors and select institutions to increase both visibility and credibility within their niche markets. In addition to marketing strategy and media promotions, the firm offers clients graphic design services and executive coaching. For more information visit www.impactcommunications.org.