



## NEWS

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## Fox Financial Planning Network Brings FinaMetrica Risk Profiling Solution to Subscribers

Sydney, Australia and San Diego, Calif. (December 13, 2010) – Geoff Davey, co-founder of [FinaMetrica](#)<sup>®</sup>, and Deborah Fox, founder of [Fox Financial Planning Network](#)<sup>™</sup> (FFPN), announced that they have entered into an alliance to support FFPN subscribers. “Now, more than ever, advisors need to have a comprehensive, accurate understanding of their clients’ tolerance for risk,” said Davey. “Using FinaMetrica as part of a systematic planning process is an ideal approach.”

FFPN is a complete workflow system and resource center for financial advisors for delivering comprehensive financial planning services to clients. Subscribers can choose Web-based, interactive or recorded training sessions during their first six months, followed by ongoing access to FFPN’s online Resource Center. The program delivers a fully systematized and documented planning process for both back office and client-facing tasks. Through the alliance with FinaMetrica, FFPN subscribers will be eligible for a 10% discount on FinaMetrica’s subscription fees. As part of the agreement, FFPN would offer FinaMetrica subscribers a 10% discount for the FFPN programs.

“I have been recommending FinaMetrica’s risk profiling system to advisors for years as an effective and meaningful method of analyzing a client’s risk tolerance,” said Fox, a practicing financial planner who leads all of the training for FFPN. “Their proprietary profiling questions and corresponding client report is the best system I’ve seen. I’m pleased that we are now able to include discounted access to FinaMetrica among the select tools and technologies available to our subscribers.”

Adding a FinaMetrica subscription to the other resources recommended to FFPN subscribers provides advisors with the following additional benefits:

- Improved quality of advice
- A repeatable system to conduct risk profiling
- Improved client understanding of financial risk and their personal risk profile
- Confidence from using an independent, expert third-party psychometric tool

“Our ultimate objective is to help advisors enhance the value of their service to clients while delivering every aspect of their services in a very systematized manner. FinaMetrica’s risk profiling tools are a natural extension of our recommended resources to subscribers,” added Fox.

### **About FinaMetrica**

FinaMetrica specializes in risk tolerance and risk-related matters. The FinaMetrica risk profiling system is based on a psychometric test of personal financial risk tolerance. Psychometrics, a blend of psychology and statistics, is the scientific discipline for testing attributes such as risk tolerance. Psychometrics provides international standards for the development of tests and for evaluating the qualities of developed test. Numerous academic studies have employed the FinaMetrica test and/or FinaMetrica data. The system enables advisers to make valid and reliable assessments of their clients’ risk tolerance, incorporate those assessments into the financial planning process and explain risk meaningfully. More information: [www.riskprofiling.com](http://www.riskprofiling.com).

### **About Fox Financial Planning Network**

Fox Financial Planning Network is a subscription-based organization that provides advisors with training, coaching, resources and tools for creating a fully systematized practice by incorporating the comprehensive operational and advisory workflow systems that were developed, and are still being used currently, by Deborah Fox in her own planning practice. Fox, also the Founder of Fox College Funding®, has been a planner since 1984. More information: [www.foxfinancialplanningnetwork.com](http://www.foxfinancialplanningnetwork.com)

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