

Media Contacts:  
Mary Kate Dubuss  
Dukas Public Relations  
212-704-7385  
[marykate@dukaspr.com](mailto:marykate@dukaspr.com)

**FI360 AND IPS ADVISORPRO® PARTNER WITH FINAMETRICA  
FOR DATA INTEGRATION**

*Integration of technologies will support enhanced advisor-client communications and more successful client and investment management practices.*

**PITTSBURGH, PA; December 16, 2013** – fi360, the premier organization for fiduciary education, investment analytics, support services and industry insights for financial professionals, today announced that its IPS AdvisorPro® cloud-based technology platform, which enables financial advisors to develop customized investment policy statements (IPS), is now integrated with the FinaMetrica risk profiling system.

Users who subscribe to both technologies can now import their clients' risk profile reports directly from the FinaMetrica system into investment policy statements generated using IPS AdvisorPro®. Used together, the technologies help facilitate advisor-client communications, mutual understanding of roles and responsibilities, and overall more successful client and investment management practices.

“This collaboration streamlines users' ability to assess a client's risk tolerance and incorporate those results into the investment policy statement, helping to better set context and expectations for the management of investment decisions,” said fi360 CEO Blaine Aikin.

This is the third integration partner for IPS AdvisorPro, which has previously integrated with MoneyGuidePro financial planning software and Redtail client management solution. For more information on the integration, please contact IPS AdvisorPro subscriber support at [support@IPSAdvisorPro.com](mailto:support@IPSAdvisorPro.com).

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**About fi360**

fi360 offers a comprehensive approach to investment fiduciary education, practice management and support that has established them as the go-to source for investment fiduciary insights. With substantiated Practices as the foundation, fi360 offers world-class fiduciary Training/Education, Tools and Resources that are essential for fiduciaries and those who provide services to fiduciaries to effectively and successfully manage their roles and responsibilities. fi360 assists those who rely on their fiduciary education programs, professional AIF® and AIFA® designations, Web-based analytical and

reporting software and resources to achieve success. For more information about fi360, please visit [www.fi360.com](http://www.fi360.com) or Twitter: @fi360.

### **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. Launched in 1998, the system is now used by 3,500 advisers in 23 countries in seven languages. More than 650,000 profiles have been completed. The FinaMetrica 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 more meaningfully. For more information, visit [www.riskprofiling.com](http://www.riskprofiling.com).