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## PRESS RELEASE

### FinaMetrica integrates award winning risk profiler with Intelliflo

FinaMetrica, part of PlanPlus Global, today announces the integration of its award-winning risk profiler with one of the UK's leading financial advice back office software suppliers, Intelliflo.

The integration enables subscribers to FinaMetrica's risk profiler to issue an invitation to a client to take a risk tolerance test at a single click within Intelliflo's market leading Intelligent Office software. This connection between the two software providers draws information from client data already held within the back office system, cutting down on manual rekeying, ensuring greater accuracy of information and linking the results to other important client information. All of which allows for a far more efficient process for the adviser and a smoother client experience.

**Paul Resnik, Director of Global Marketing at PlanPlus Global, said:** "FinaMetrica's integration is an important milestone in our participation in the UK financial industry's sharing of client data that's a prerequisite to business efficiency and informed consent.

"Suitability is the stick with which regulators around the world are hitting all parties involved in the provision of financial advice. Without informed client consent, it's very hard to evidence the advice provided was suitable.

"The suitability of an investment decision must start with the client fully understanding his or her tolerance to risk, risk required and capacity for loss.

"An investor's informed consent can only be achieved when all relevant information is available and usefully displayed. With this integration, our subscribers using Intelliflo's Intelligent Office software will find that giving auditable, defensible and suitable personal advice will be easier from today."

**Nick Eatock, Intelliflo's Executive Chairman, said:** "This integration with FinaMetrica adds another 'best of breed' partner to iO, further boosting the flexibility and range of tools available to our customers."

The integration, which will enable Intelligent Office users to download the FinaMetrica risk tolerance testing tool via the iO Store, will provide advice firms with a fast and efficient way of assessing the risk appetite of their clients and prospects.

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**About PlanPlus Global Inc.**

**Award-Winning Financial Advice Platform and Risk Profiling Toolkit**

PlanPlus Inc. and FinaMetrica Pty Ltd., two veteran and highly regarded firms, combined their 45 years of experience and formally evolved their decade-long collaboration in 2017 to become PlanPlus Global Inc.

The PlanPlus financial advice platform offers the broadest set of software tools to serve the worldwide financial advice community through our multi-lingual, multi-currency and multi-jurisdictional (taxation) financial planning software and next-gen intelligent automated financial advice solutions (robo-advisor).

The FinaMetrica psychometric risk tolerance tools enables financial institutions and advisors alike to meet the increasingly onerous KYC and 'suitability of investments' regulatory regimes, such as MiFID II.

PlanPlus Global is a recognized thought leader in the areas of financial planning and risk profiling, and our solutions are all founded on leading academic and evidence-based research, as well as industry 'best practices'. PlanPlus Global's solutions are used every day by thousands of financial institutions and financial advisors from more than 30 countries. For more information, visit: [www.planplus.com](http://www.planplus.com) and [www.riskprofiling.com](http://www.riskprofiling.com).

**About Intelliflo**

Intelliflo ([www.Intelliflo.com](http://www.Intelliflo.com)) has been providing information technology services to financial services companies since its formation in 2004. Its leading web-based practice management software, Intelligent Office, is the most widely used by new UK financial advisers\* and helps financial businesses large and small to improve efficiency and increase profits. Intelligent Office supports over 2,200 firms and 19,500 users with assets under advice of £354 billion (as at 1 April 2018). Intelliflo was named Best Technology Provider 2017 and 2018 at the Professional Adviser Awards and Best Back Office System 2017 by Professional Paraplanner magazine. ISO27001 accreditation assures advisers that their data is safeguarded within a high quality security management framework.

In July 2013 HgCapital, a leading European private equity investor in B2B technology companies, became a majority shareholder in Intelliflo Ltd. HgCapital has a wealth of expertise in developing web-based software businesses and is committed to supporting the next phase of Intelliflo's growth.

\*Based on number of directly authorised financial advice firms registered in 2017