SERVE YOUR CLIENTS.

GROW YOUR BOOK.

DISTINGUISH **YOUR** PRACTICE.

REAL & ACTIONABLE INSIGHTS

Discover your clients' investing personality and the ways it may affect decision making so you can understand how they are likely to react to different investing climates, markets, asset classes, and relationship scenarios.

GAUGE SUITABILITY

Through the utilization of a proprietary algorithm built by Drs. Peterson and Murtha, the advisor is provided with a strategy for their clients that is suitable to their unique investor personality.

MANAGE RELATIONSHIPS

Gain insight into your clients' needs and tendencies, a crucial factor in solidifying and deepening those relationships.

For more information on any of our products or services please visit us on the Web at: www.marketpsychinsights.com

insights

ADVANCED TOOLS FOR
THE MODERN FINANCIAL ADVISOR

FEATURES AND BENEFITS

In the competitive marketplace for financial advice - with an increasing number of wealth management options for investors - distinguishing oneself is critical. Demonstrate to prospects/clients that you are dedicated to understanding and meeting their needs by leveraging next generation analytics and academic research to provide superior service.

Convey this commitment with actions, not just words, to foster a relationship of mutual trust that is vital to achieving “goal alignment” with clients.

While many advisors may claim to deeply understand and serve their clients, few do. With Insights, you can be truly **exceptional** and **walk the walk**.

Discover your clients' investor personality and the ways it may affect decision making. Then engage those [Insights] in a plan that gives the investor the best chance of success. Insights enables you to truly understand how clients are likely to react to different investing climates, markets, asset classes, and relationship scenarios. All so you can differentiate yourself and your practice from the status quo.

Insights Advantage

- Get to know your client at an accelerated rate
- Takes less than 10 minutes to complete
- Anticipate client reactions to different investing climates, markets, and asset classes
- Proactively manage the client-advisor relationship

With Insights next-generation analytics, you can invest and manage the client-advisor relationship with confidence and accuracy.