[Advisor] + Personality

[Advisor] has partnered with TIFIN Personality to employ cutting-edge technology to help us serve you better.

Each client is unique. And our intent is to provide you with the best possible partnership, advice, and execution by ensuring we know exactly what you want and need from your investments.

It all starts with the **Financial Personality Assessment**. This assessment can help us identify your dominant financial personality traits and gain a deeper level of understanding about the types of investments we should consider.

TIFIN Personality has worked with academics from Wharton, Harvard and MIT spent decades scientifically testing ways to bridge positive psychology, modern wealth management, and technology to change how people connect with investing.

[ADVISOR] will then take what we learn from the assessment to tailor your portfolio to your unique preferences, and continue to do so as your priorities change over time.

What is a Financial Personality?

The TIFIN Personality framework evaluates a person's financial personality in four dimensions:

Purpose: Investing to find a deeper sense of meaning and purpose.
Integrating ESG and impact investing themes into portfolios.

Security: Investing to provide physical security and peace of mind.
A risk-adjusted growth lens that helps investors derive a sense of security.

Touch: Linking investing with a desire for meaningful relationships.
The how, why and what of relationships interacting with investors.

Viewpoints: Investing to gain the intellectual satisfaction of getting things right.
Expressing your views through sector, geographic and thematic portfolio tilts.

TIFIN Wealth

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