



## Promotional Language: Email

### Current Client

As a valued client, we would like you to take this short financial personality assessment. This will help us gain more insight into who you are, what drives you and how we can continue to help you.

### Current Client #2

I started using a helpful Financial Personality Assessment to serve you better by learning more about what drives you and how I can continue to best align your investments. As part of our yearly review, I would like you to take this short quiz. I think you will be intrigued by the results!

### Current Client Lifecycle

As your life changes, so do your priorities. (Congratulations) on (life event). I invite you to take a quick Financial Personality Assessment to explore how to align your investments with this exciting new phase of your life.

### Current Client with Risk

As a valued client, we would like to invite you to take this short risk tolerance and financial personality assessment so we can better serve you.

### Prospecting Scripts

1. Here at xxxxx, we want to help you change the way you invest to not only grow your wealth, but also impact causes that are important to you. The TIFIN Personality Financial Personality Assessment is a proprietary tool that connects scientific research on positive psychology with the principles of modern wealth management. It is a great first step in gaining insights on your financial personality and how to make your money work harder on topics that really matter to you. Learn how to gain more from your wealth by investing in causes you care about. Make a greater impact at the same time as growing your nest egg.
2. Learn how the causes in the world that matter most to you can connect to your financial strategy in specific and tangible ways.
3. Do you feel engaged with your investments? Do you want to explore how your money can help the causes you care about while seeking to grow your wealth at the same time? Take the Financial Personality Assessment. Together, with the TIFIN Personality team, xxxxx spent decades in the field of academia and finance, scientifically testing ways to bridge positive psychology, modern wealth management, and technology to change how people connect with investing.
4. Let's get to know you. You are more than a number or dollar. We want to know you as a person and discover how to help you invest in what matters most to you. Take the Financial Personality Assessment and we can learn more about your preferences together.



## Follow-Up to initial invite to take assessment

I recently sent you an invitation to take a financial personality assessment designed by leading academics. A personalized approach is what xxxxx is about. Before we get to personalize, it's important to understand our clients' personalities. We like to call it your "Why?" What are your intrinsic drivers? What is the link between your wealth and your happiness? How do you want your money to work for you? Once we understand your "Why?" we will build a proposal that is uniquely *you*.

Please complete the assessment for us to get a better understanding of who you are, what drives you, and how we can help.

## Follow-Up to initial invite to take assessment WITH RISK

I recently sent you an invitation to take a financial personality risk assessment. It's important to understand our clients' personalities and risk capacity so that we can tailor your investments to your needs.

Please complete the short minute assessment to get a better understanding of who you are, what drives you and how we can continue to help

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Were you surprised by your Financial Personality Assessment results?

I would love to help you create a financial plan that reflects your unique financial personality and helps you achieve your goals. Please feel free to contact me directly or [schedule time on my calendar](#). <<insert link>>. Otherwise, I will call you at (insert time and date) from this number (insert phone number).

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Were you surprised by your Financial Personality Assessment results?

In our 20+ years of experience in the financial services industry, I have noticed that client portfolios often differ from their core beliefs.

Your investment portfolio should not only align with your financial goals, but your social values as well. That's why we're different at xxxxx.

If you're unsure if your investment portfolio aligns with your values and viewpoints, we are happy to conduct a complimentary portfolio review. Please reach out if you're interested in this offering.



## Personality Assessment Follow Up

Congratulations on taking your Financial Personality Assessment. The assessment is just the first step to aligning your investments with your preferences and interests.

(Add section on personality type below)

I'd like to connect with you to share some ideas on how you can express your personality type in your portfolio. Would any of the following times work for you?

(Times)

### **Purpose**

Investors with Purpose as a dominant personality characteristic place a significant importance on meaning. Investing is not just about returns, but also a big way they can have a positive impact on the world around them. Purpose investors are often generous in their giving and seek to express their values in as many aspects of their decision making as possible including who they work for, what they buy and what they invest in.

### **Security**

Investors with a high financial personality score in Security believe it's important to know they have enough invested to meet their goals and that their financial future is well taken care of. Protection, rather than risk, is their dominant investment objective.

Research and validation are part of a Security investor's identity. They are often willing to put in plenty of effort to get to a higher level of understanding required to provide them with comfort surrounding their decisions, or to work with a professional who can provide this for them.

### **Touch**

Touch Investors prefer to take a hands-on approach to their portfolio and build a close relationship with their financial advisor through frequent communication. Somebody with a high score in Touch believes the way they interact with their investments is very important. Their relationship to investing is shaped by a desire to understand performance drivers and derive comfort from knowing they're making good decisions.

### **Viewpoints**

Viewpoints investors want to test their knowledge of emerging trends that are shaping the future. They see investing as a way to satisfy and test their natural intellectual curiosity. They often have a desire to express their world views through their investments. Viewpoint investors tend to be lifelong learners, early adopters, and are willing to learn about technologies and trends shaping the future.