



TIFIN Personality

Where Faith Meets Finance: Biblically Responsible Investing

Religious beliefs often guide charitable giving.
But they can also guide investment choices.

In today's world of bespoke clothing and customized coffee, more and more investors are looking to extend the trend of personalization to their portfolios. For many, this means making sure their investments and values are aligned.

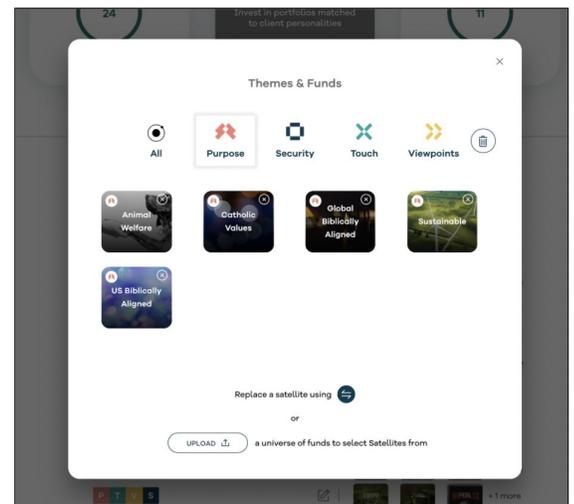
Still, some investors may be reluctant to tell their advisors about one very personal area of interest: their religion. While their faith may guide which charities they support, people may stay agnostic when designing their portfolios and building personal wealth.

They don't have to. Faith can align with financial decisions. An increasing number of investors today are choosing this path and making sure their holdings match their religious beliefs – in other words, putting their money where their morals are.

In 2020 alone, impact investors around the world channeled a combined US\$2.3 trillion toward strategic causes. The Global Impact Investing Network found that 90% of impact investors are happy with their returns. Almost 20% even report outperforming their expectations. Academics from the Wharton School and the University of Chicago Booth School of Business have formed the Impact Finance Research Consortium to gather more data and further study impact investing such as BRI, testament to the growing appeal of a purpose-based investment approach.

The Financial Personality Assessment

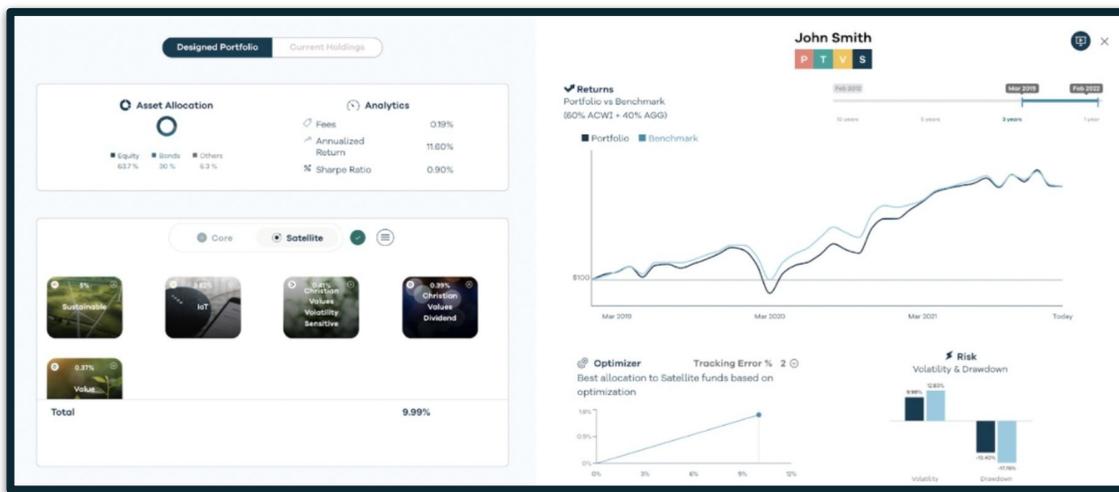
TIFIN Personality aims to help align each person's unique set of beliefs with their portfolio. The Financial Personality Assessment reveals whether somebody is a "Purpose" dominant investor. They can also express a specific interest in various areas related to faith-based investing.





Benefits to Advisors

- Prospect, convert, grow assets, increase retention, and gain referrals
- Advisor Success team supports you every step of the way
- Personalize the full experience to better engage clients
- Uncover held-away assets to grow your AUM
- Drive referrals and lead capture with personality comparisons
- Easily integrates with widely used CRM platforms and custodians
- Multi-dimensional risk assessment included with full platform



The Personality Framework

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, impact investing, religious or other 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.
Investors who prefer to take a hands-on approach to their portfolio and build a close relationship with their advisor through frequent communications.



Viewpoints: Investing to gain the intellectual satisfaction of getting things right.
Investors who seek emerging trends that are shaping the future and express their world views through investments.