TIFIN Personality

TIFIN Personality for Financial Advisors

By using positive psychology to identify what matters most to investors, TIFIN Personality deploys cutting-edge technology to help you differentiate and grow.

Together with the TIFIN team, 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.

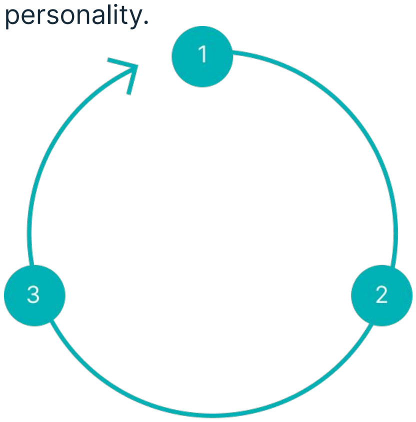
It all starts with your own custom version of the **Financial Personality Assessment** which advisors use with clients and prospects.

Insights are then used to personalize client communications, proposals and portfolios through our easy-to-use platform.

While personalization was once a “nice to have,” providing a personalized experience has become essential to remaining competitive.

Attract

Taking the personality assessment is an easy way to attract new clients who want to understand their unique financial personality.



Convert

Engage on a deeper level with potential clients by building a personalized proposal made just for them. It even integrates risk preference as well as risk capacity, so you can immediately implement tailor-made plans.

Retain

Align your clients portfolio and financial plan to their values. They'll be happier, they'll stay with you longer, and you'll generate more referrals when you put TIFIN Personality into action.

2440 Junction Pl, Boulder, CO 80302 | TIFINwealth.com/personality

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
- Drive referrals and lead capture with personality comparisons
- Connect with younger generations through SRI/ESG
- 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.