



**PlanPlus Inc.**



## **FOR IMMEDIATE RELEASE**

### **FinaMetrica Risk Profiling System Released in Canada as Integrated Module with PlanPlus Web Advisor**

**SYDNEY, AUSTRALIA February 2006** FinaMetrica, an Australian software and research company specializing in psychometric risk profiling systems, announced today the release of their web- based risk profiling system for the Canadian market. The initial launch will be a module integrated with PlanPlus Web Advisor – the financial and investment planning tools of PlanPlus Inc., Lindsay Ontario, Canada.

“We are delighted to have partnered with PlanPlus”, said Geoff Davey, Managing Director and Co-Founder of FinaMetrica. “The multi-country, multi-language capability of the PlanPlus Web Advisor makes it a world leader in planning software. The PlanPlus software integration strengthens our offering in our current markets and introduces us to new markets beyond our current scope – most important of which is Canada”.

FinaMetrica's Risk Profiling system is the world's first generally available system to meet internationally accepted psychometric standards. Research has shown that the risk profiling questionnaires used by most firms fail to actually measure risk and in many cases advisors would be as accurate to classify clients as “moderate plus or minus 50%”.

The FinaMetrica system offers previously unattainable levels of validity, reliability and accuracy in risk tolerance assessment. FinaMetrica provides a scientifically validated technique for assessing financial risk tolerance and an easily understood methodology for incorporating the assessment into the financial planning process.

“The FinaMetrica system is a world leader in risk profiling and in use by leading advisors in eight countries including the U.S. and the U.K. where we first became familiar with it”, said Shawn Brayman, President of PlanPlus Inc. “Over the past several months we have been working with FinaMetrica to localize the model for Canada as well as to integrate to their new web service interface for common customers in Europe, Asia and North America.”

Existing PlanPlus Web Advisor users will have an option to subscribe to the FinaMetrica system and switch between the standard 10-question profile in Web Advisor and the more elaborate FinaMetrica profiling questionnaire. The profile then maps to an appropriate model portfolio based on asset allocation principals to generate a customized Investment Policy Statement.

## **About PlanPlus Inc.**

PlanPlus Inc. is a Canadian firm that provides wealth management and financial planning solutions based on their PlanPlus Web Advisor software to financial services firms worldwide. PlanPlus has users in North and South America, the Caribbean, Asia and Europe. Customers include banks, stock brokers/investment firms, insurance, credit union, mutual fund and financial planning firms. As well as professional software solutions, PlanPlus for Students is an educational planning package used by colleges, universities and professional associations teaching financial planning principals and skills in Canada and internationally. PlanPlus is a Canadian company established in 1990. It is privately owned and located in Lindsay, Ontario.

Website: <http://www.planplus.com>

## **About FinaMetrica**

FinaMetrica is a leading Australian behavioural finance group. FinaMetrica's focus is on the human intangibles relevant to financial decision-making. Its mission is to develop tools that will assess these intangibles in terms that are meaningful to individuals and their advisers. Its web-based risk profiling system is the first to meet psychometric standards and has gained international recognition as world's best practice. Continued international expansion has seen FinaMetrica establish client relationships in Australia, New Zealand, the United States, the United Kingdom, Hong Kong, Switzerland, Kuwait and Malaysia, and prepare more than 150,000 risk profiles. FinaMetrica was established in 1998. It is privately owned and based in Sydney.

Website: <http://www.risk-profiling.com/>

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