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## **Capital Preferences Partners with FPA, and T. Rowe Price to Initiate New Research to Better Understand Investor Behaviors**

*Provides financial planners and advisers benchmarking comparison to peers*

*Deadline for benchmarking survey is July 25 and results will be released at the 2018 FPA Annual Conference in Chicago this October*

DENVER (July 2, 2018) –New technology, regulations, and customer change are redefining what it means to truly understand clients of financial services. The Financial Planning Association® (FPA®), Capital Preferences, and T. Rowe Price are initiating a new study providing research and insight to help financial advisers and planners better understand and serve their existing and prospective clients.

The research aims to answer key questions that are central to financial planners and advisers serving the needs of 21<sup>st</sup> century investors. Some of the key issues to be explored in the survey include, but are not limited to:

- How are financial planners and advisers evolving their client understanding practices to support more holistic advice delivery?
- What must change about client understanding practices to support ‘co-planning’, behavioral coaching, and other more engaging ways for financial planners and advisers to add value?
- What tools and technologies are delivering a more efficient client discovery and fact-finding experience?

“As a financial planner, I need to be able to understand my clients and what drives their investment decisions. Having this understanding will allow me to best serve their needs while driving value in the services they receive,” says 2018 FPA President Frank Paré, CFP®. “We are

delighted to partner with Capital Preferences and T. Rowe Price on this research that will assist all of our members in their work as financial planning professionals.”

The research, which officially kicked-off in April with a series of qualitative interviews with financial planners and thought-leaders, will include two additional phases of research. A [benchmarking survey](#) is now live and will conclude on July 25. A second qualitative phase will kick-off in July and will conclude in late September. All qualitative findings and survey data will be used in developing a final report that will be released at the 2018 FPA Annual Conference in Chicago on October 3-5. All research participants will also receive a customized benchmarking report that enables them to benchmark their individual client understanding practices to those of the greater advisory community.

"The firms and advisers that excel in the next decade will be those that know their clients best – the ones that turn client understanding into their competitive advantage,” says Bernard Del Rey, CEO of Capital Preferences. “We are excited about the opportunity to carefully research the best practices across the world and outline the path to success."

Beyond benchmarking, the study is unique in that it aims to provide the step-by-step roadmap that planners can use to evolve their client understanding approach, and thrive in an era of a more empowered client.

“We are pleased to sponsor this study with the Financial Planning Association and Capital Preferences, “ said George Riedel, head of U.S. Intermediaries at T. Rowe Price. “In today’s ever-changing environment, we believe it is critical to provide advisors with actionable insights to help them to further deepen their knowledge and understanding of their client needs, which ultimately helps to build their practice.”

All financial planners and advisers are invited to participate in the [benchmarking survey](#), which is open from now until July 25. All participants will immediately gain access to an initial key findings report upon completion of the survey, as well as a customized benchmarking report when research concludes. Additional information about the research initiative can be found [HERE](#).

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### **About the Financial Planning Association**

The Financial Planning Association® (FPA®) is the principal professional organization for CERTIFIED FINANCIAL PLANNER™ (CFP®) professionals, educators, financial services professionals and students who are committed to elevating the profession that transforms lives through the power of financial planning. Through a collaborative effort to provide members with tools and resources for professional education, business support, advocacy and community, FPA is the indispensable resource in the advancement of today’s CFP® professional. Learn more about FPA at [www.OneFPA.org](http://www.OneFPA.org) and follow on Twitter at [twitter.com/fpassociation](https://twitter.com/fpassociation).

### **About Capital Preferences**

Capital Preferences provides enterprise quality client profiling, compliance and portfolio recommendation solutions, based on rigorous academic research and a focus on revealed, rather than stated, preferences.

Capital Preferences is the creator of TrueProfile, the only tool for financial advisors that reveals their clients' true risk tolerance, loss aversion and decision consistency as defined by economic science — providing statistical confidence for every client result. For more information about Capital Preferences and True Profile, visit [www.trueprofile.com](http://www.trueprofile.com) and follow on Twitter at [twitter.com/TrueProfileSays](https://twitter.com/TrueProfileSays).

### **About T. Rowe Price**

Founded in 1937, Baltimore-based T. Rowe Price Group, Inc. is a global investment management organization with \$1.04 trillion in assets under management as of May 31, 2018. The organization provides a broad array of mutual funds, subadvisory services, and separate account management for individual and institutional investors, retirement plans, and financial intermediaries. The company also offers sophisticated investment planning and guidance tools. T. Rowe Price's disciplined, risk-aware investment approach focuses on diversification, style consistency, and fundamental research. For more information, visit [troweprice.com](http://troweprice.com) or our [Twitter](#), [YouTube](#), [LinkedIn](#), and [Facebook](#) sites.