

# XPLAN OVERVIEW

## An IRESS Wealth Solution

XPLAN 2.0 BRINGS WITH IT SIMPLICITY AND BUSINESS EFFICIENCY FOR ADVISERS  
THE RELEASE OF XPLAN 2.0 REPRESENTS AN EXCITING AND REVOLUTIONARY DEVELOPMENT IN FINANCIAL PLANNING TECHNOLOGY.

The new version is the culmination of years of experience in the desktop world, feedback from clients and the experience of our global partners giving you a system that is easy to use and has been designed to meet the expectations of advisers in South Africa.

## WHAT'S NEW

- A new-look web interface
  - Designed to efficiently complete increasingly complicated tasks  
Looks modern and remains relevant  
Software is fast, easy to use and consistent in every screen of the application
- Ease of operation translates to:
  - Reduced training and implementation times
  - Less time spent learning the software and more time to get on with business
  - Customisation of reports and processes allows each business to be unique in its production of advice
- Unique design
  - New features can continue to be added without the software becoming overly complex.
- New Modules
  - IPS
    - An electronic tool that integrates directly with all investment companies allowing you to manage and collate investment portfolios for review, modelling and reporting
    - Investment product prices are updated nightly without any need for user interaction
    - Transactional data feeds can be integrated from any LISP platform
  - XLite
    - Enables Advisers to now work off-line when required

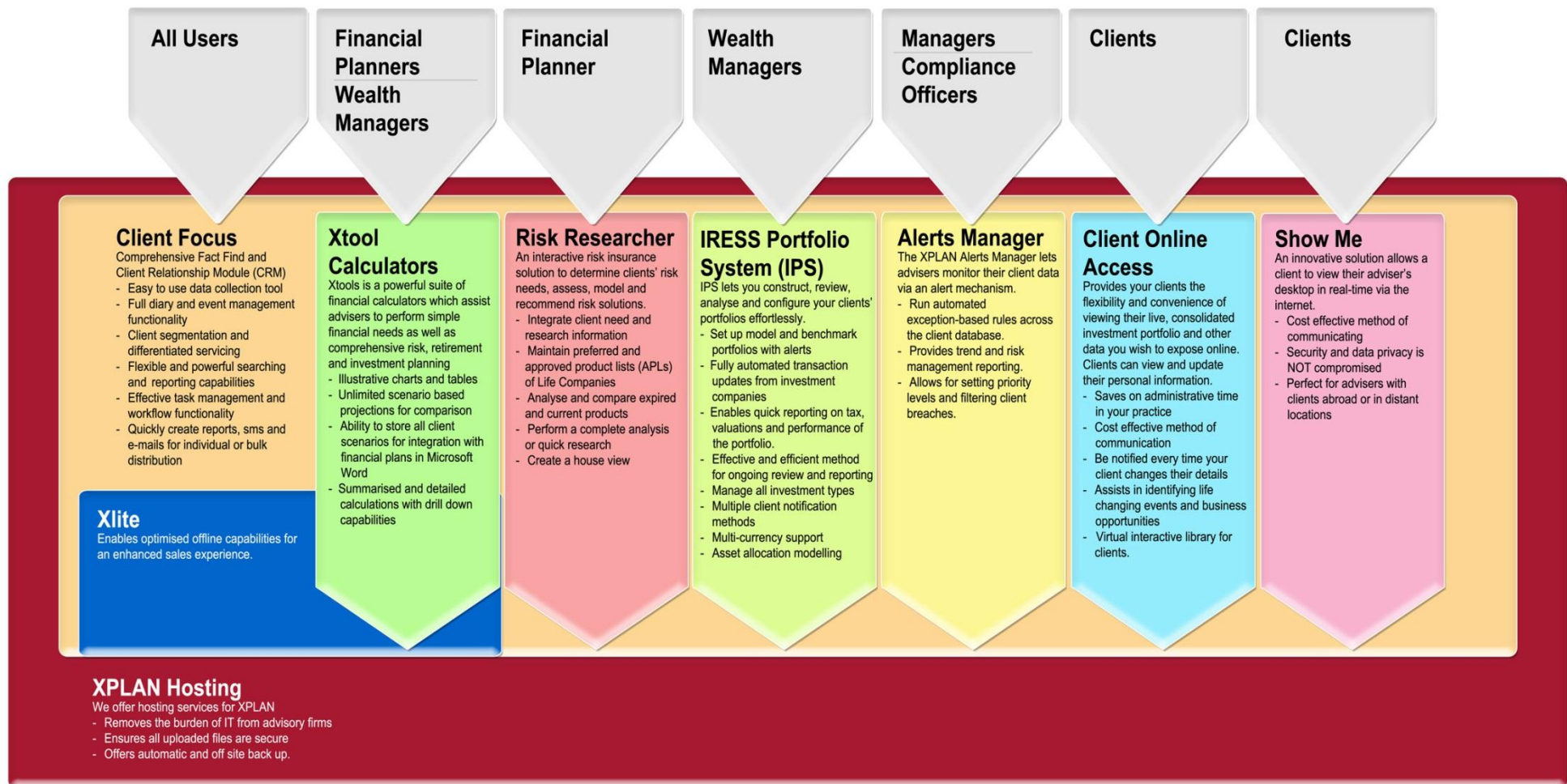
There is no single best practice for running a financial planning business as such xplan 2.0 has been designed to provide a solution that offers the best outcome for each business, with flexibility being the key. Xplan 2.0 is able to adapt to each business rather than the business having to adapt to the technology. This means that each financial planning business can customise the software to suit its needs and produce unique reports to suit the business.

Iress believes in developing technology to suit your needs. As such, we have three editions of xplan, namely: xplan standard, xplan professional and xplan enterprise to meet the business requirements of small to medium and large financial planning businesses.

Xplan 2.0 is a revolutionary new product that demonstrates our commitment to ensuring advisers have the best and most functional software platform. Our passion for providing leading edge technology drives the continuous and ongoing process of improving our software so advisers can service their clients effectively and efficiently.

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## XPLAN Modules



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- Client management
- Practice management
- Document management
- Leads management
- Portfolio management and research
- Cash flow modelling
- Risk insurance research
- Compliance management

XPLAN is delivered as a total solution, which comprises: infrastructure, integration, data transformation, migration and, most importantly, on-going support.

Clients can choose **to customise the XPLAN user interface**, the data that is stored, and all forms of output. Features such as user security profiles, investment profiles, economic assumptions and asset classes are user defined.

### Training & Workshops

Iress offers introductory training for administrators and financial planners. Our sessions are run monthly at our regional offices at NO ADDITIONAL COST to you. For more information, please visit our website [http://www.iress.co.za/support\\_training.aspx](http://www.iress.co.za/support_training.aspx)

### On-going support from our Knowledge Center

Technical and Functional support, from highly skilled and experienced staff, are delivered via phone and using remote technology. Support via remote technology accesses your site via the web to deliver quick, efficient resolution of your queries ensuring minimal downtime. Our Knowledge Center support is provided at NO ADDITIONAL COST to you.

#### SOUTH AFRICA

Johannesburg | +27 11 575 0040  
Cape Town | +27 21 657 8800  
Durban | +27 31 203 7500

#### AUSTRALIA

Melbourne | +61 3 9018 5800  
Sydney | +61 2 8273 7000  
Brisbane | +61 7 3011 4700  
Perth | +61 8 6211 5900  
Adelaide | +61 3 9018 5800

#### ASIA

Hong Kong | +852 3965 3341  
Singapore | +65 6672 6288

#### CANADA

Toronto | +1 416 907 9200

#### NEW ZEALAND

Auckland | +64 9 300 5571  
Wellington | +64 4 462 6850

Email | [enquiries@iress.co.za](mailto:enquiries@iress.co.za)

WEB | [www.iress.co.za](http://www.iress.co.za)

