

XPLAN NAMED TOP FINANCIAL PLANNING APPLICATION FOR EIGHTH CONSECUTIVE YEAR

IRESS' advice and wealth management platform XPLAN has been named the leading Australian financial planning application by research house Investment Trends for the eighth consecutive year. The 2014 Financial Planning Software Benchmark Report, now in its tenth year, said XPLAN was an "outstanding example of Australian software engineering".

XPLAN achieved a 94% score – the highest score in the ten years of the report – and led in the five categories of client management, advice provision, portfolio management, practice operations and integration.

The report noted XPLAN had undertaken more improvements than all others surveyed combined and was ranked first for overall functionality. The report said IRESS continued its relentless development program in 2014, at a time when other planning applications have entered their mature stage.

"XPLAN has continued to innovate. With a global market for its wealth management applications it is adding more new and revised functionality than all of the other developers put together," the report said.

The report noted IRESS' improvements continued to focus on real-time access to data, integration to practice workflow and support for client-facing engagement. This was on browser and tablet functionality.

IRESS Chief Executive Officer, Andrew Walsh, said: "We are very pleased to be named the top financial planning application for the eighth year in a row. We do not take our market-leading position for granted and continue to focus on meeting the needs of clients through providing reliable, trusted and innovative solutions.

"The past twelve months have been no exception with a significant number of enhancements to improve the access and functionality of XPLAN, for advisers and their clients and licensees."

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About IRESS

IRESS is a principal supplier of wealth management, mortgage and financial markets systems in, Australia, Asia, New Zealand, Canada, South Africa and the United Kingdom.

All product streams support a diverse range of roles and offer front, middle and back-office functionality for clients that range from financial service institutions through to independent operators.

IRESS is a progressive, service-based organisation that employs over 1340 staff globally, with local knowledge and industry experience.

IRESS strives for excellence in relationships with clients and industry bodies alike. IRESS is client-driven, responsive and promotes a culture that supports working with customers and the industry to face challenges and keep pace with industry developments.

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About Investment Trends

Investment Trends is a leading specialist market research organisation in the Australian wealth management industry, providing new insights and decision support information to over 200 leading financial services businesses. Investment Trends combines analytical rigour and strategic thinking with the most advanced research and statistical techniques to help clients gain competitive advantage.

Offices in:

Australia, Canada, Hong Kong, New Zealand, Singapore, South Africa, United Kingdom.