XPLAN

An IRESS Wealth Solution

XPLAN IS A WEB-BASED SYSTEM COMPRISING A COMPLETE SUITE OF TOOLS FOR FINANCIAL PLANNING PROFESSIONALS. XPLAN INCREASES EFFICIENCY, IMPROVES CLIENT SERVICES, AND REDUCES COSTS.

XPLAN SOLUTIONS

- Client management
- Practice management
- Document management
- Portfolio management and research
- Cash flow modelling
- Risk insurance research
- Dealer group and compliance management

XPLAN is delivered as a total solution, which comprises: infrastructure, integration, data transformation and 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.

"Comprehensive, integrated wealth management tools."

XPLAN MODULES

XPLAN clients subscribe only to the modules they need, tailoring a financial platform to suit.

CLIENT FOCUS

Client Focus is a comprehensive Fact Find and Client Relationship Module (CRM), which offers easy to use data collection tools that are flexible and powerful.

Client Focus incorporates task management and workflow functionality to assist advisers and support staff in staying on top of all scheduled tasks - both client and non-client related.

An Xmerge tool supports building templates, merging data and managing templates centrally and compliantly. Xmerge is an office integration tool that will change how you use standard plan and form letter templates.

CLIENT ONLINE ACCESS

Give your clients the flexibility and convenience of viewing their live, consolidated investment portfolio and other data online. Client Online Access brings your clients to your website for a consolidated view of their investments.

SHOW ME

The XPLAN Show Me module lets allows clients to view their adviser's desktop in real-time via the internet. This is an innovative solution for advisory groups interested in web-assisted or remote advice without compromising security and data privacy.

IRESS PORTFOLIO SYSTEM (IPS)

IPS is a scalable portfolio reporting solution that lets advisors manage and provide reports to their clients in printed form, or via internet access to their portfolio.

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XTOOLS

Xtools is a powerful suite of calculators which help advisors identify client needs which will result in business opportunities in a simple, logical and easy-to-use interface.

The NZ Retirement Funding Xtool includes:

- Kiwisaver
- PIE Tax Calculations
- NZ Super
- Monte Carlo simulation
- Integration with client data for Statement of Advice Generation

eAPPLICATIONS

eApplications is form technology for producing client-centric forms that interact with product providers. Existing client and recommended product details are electronically validated to produce forms, such as pre-filled paper forms, or comprehensive messages for sending electronically.

ALERTS MANAGER

The XPLAN Alerts Manager:

- lets advisers monitor their client data via an alert mechanism
- provides trend and risk management reporting for dealer audit teams.

With Alerts Manager, advisers and dealer groups run automated exception-based rules across their client database. This leverages off consolidated client and portfolio data.

Rules specify criteria, across all XPLAN modules, for filtering client breaches and setting priority and breach levels. Each rule is defined with a follow-up action.

RISK RESEARCHER

Our fully interactive risk insurance solution, Risk Researcher, contains all the tools necessary to determine client risk needs, and assess, model and recommend risk solutions. Advisers can maintain preferred and approved product lists (APLs) at a Life Company or product level, and can create APLs at a group or user level

IRESS RISK PROFILER

IRESS Risk Profiler is a psychometric, independent risk tolerance analysis and risk profile selector.

COMMPAY

CommPay is a flexible rules-based commission system, which empowers advisors and other Australian Financial Service Licence (AFSL) holders with the ability to design and manage simple or sophisticated remuneration models.

MORTGAGE QUALIFICATION

IRESS offers a number of IT solutions for mortgage broking professionals.

Central to this offering is Debt Qualifier, an integrated mortgage qualification and research tool, which supports loans and risk management.

XPLAN HOSTING

IRESS Wealth Management is committed to providing a complete technological solution. We offer hosting services for XPLAN that remove the burden of IT from advisory firms by managing all aspects of software delivery and management.

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