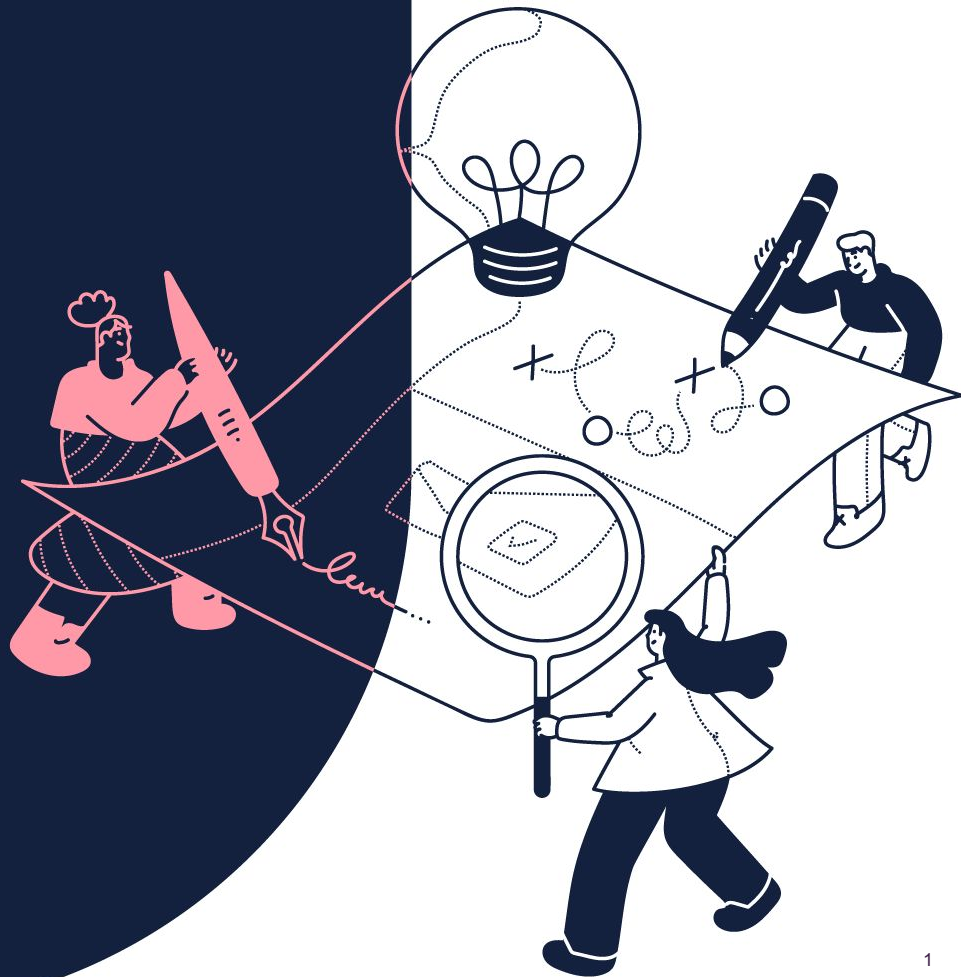




Wealth APAC 2025 delivery roadmap

Q2 | 2025



Rethinking advice **for more Australians**



The time is now

Financial literacy is declining, 11.8m Australians (and growing) have unmet advice needs.

New entrants are increasingly competing for the potential \$2.1bn in advice fees.

Growth by design

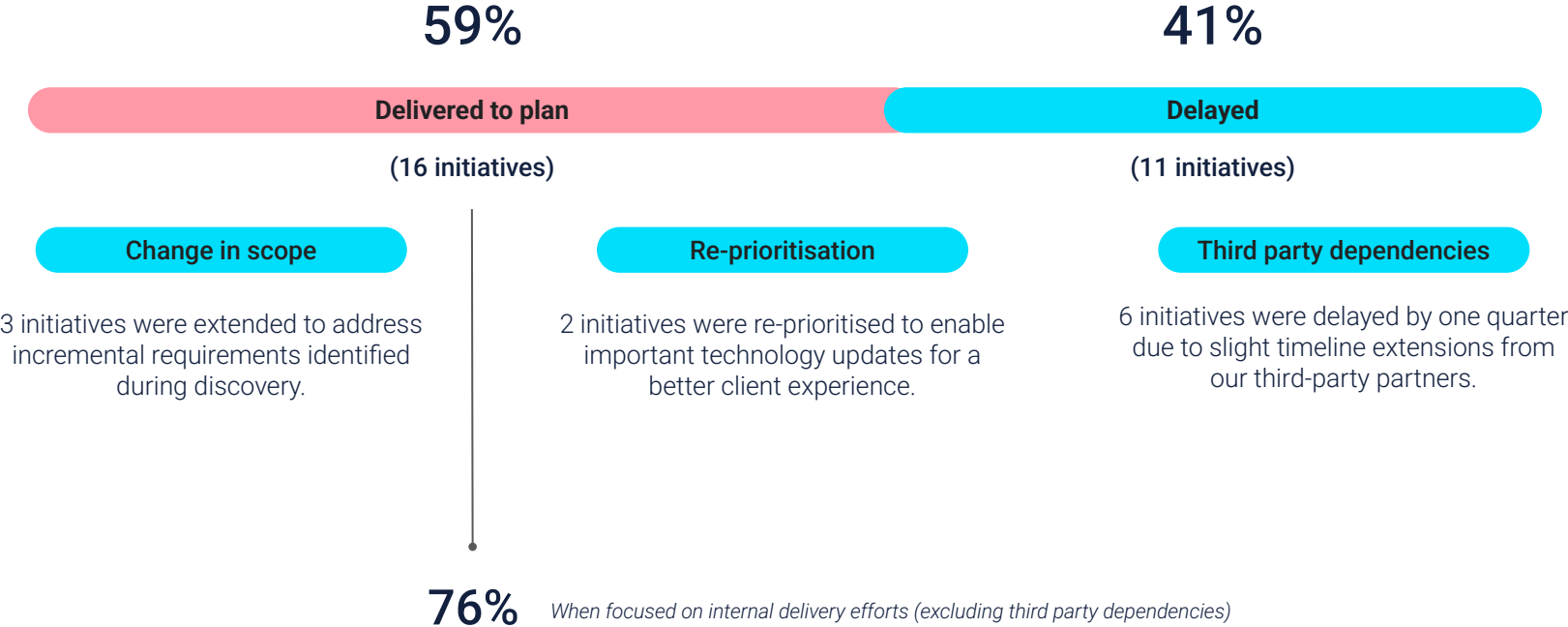
95% of Advisely members have capacity to take on more clients, 1 in 3 want to target mass market.

To be successful, advice businesses must make intentional decisions about their customer, business model, and advice offer.

Making advice scalable

We're doubling down on efforts to help close the advice gap, with **more growth experts and resources** through Advisely, and investment in advice tools that support **efficiency, scalability, and flexible advice models** that cater to the broader demand for advice.

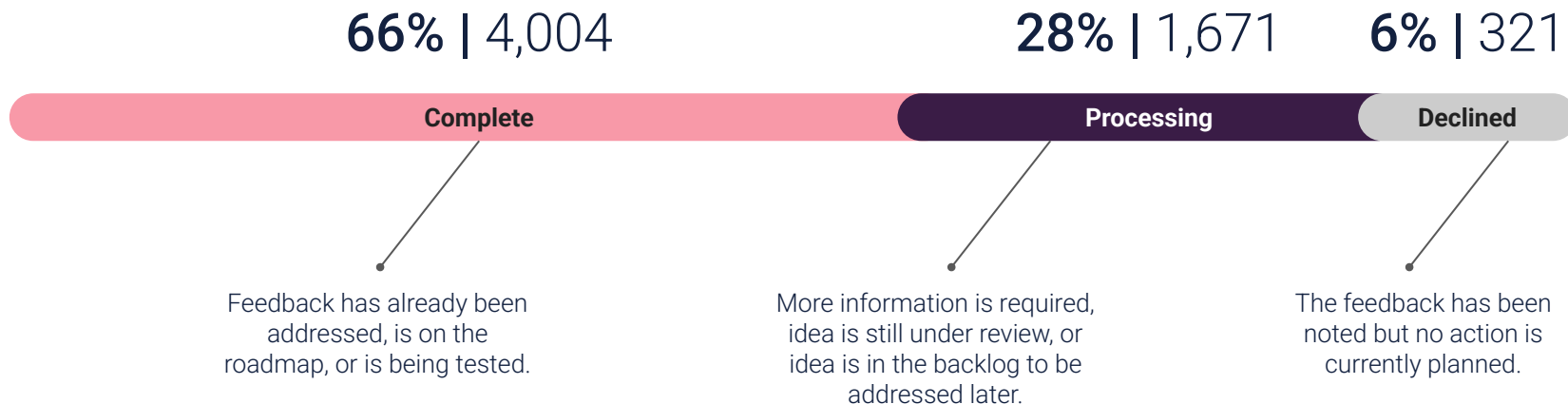
Our Q1 2025 roadmap **delivery stats**



Our Q1 2025 roadmap **feedback stats**



We're always listening — through research panels, webinars, community forums, and support channels — to ensure your feedback drives our innovation. In fact, client input is a key part of every new feature we develop. You'll see this reflected throughout our roadmap, with client-driven enhancements highlighted along the way.



Five **pillars** for advice tech product development



The 2025 roadmap is built around critical pillars that guide our significant investment in Xplan's capabilities, and is underpinned by a commitment to **continuous uplift**, incorporating **your feedback** and value-add **integrations**. It contains both our deliverables for 2025 and the key longer term initiatives currently underway.

Supporting improved adviser efficiency

Automation and streamlined workflows that enable you to focus more on your clients.

Leading the way in compliance & security

Proactively safeguarding your business, clients and advisers.

Boosting precision in client portfolios and tooling

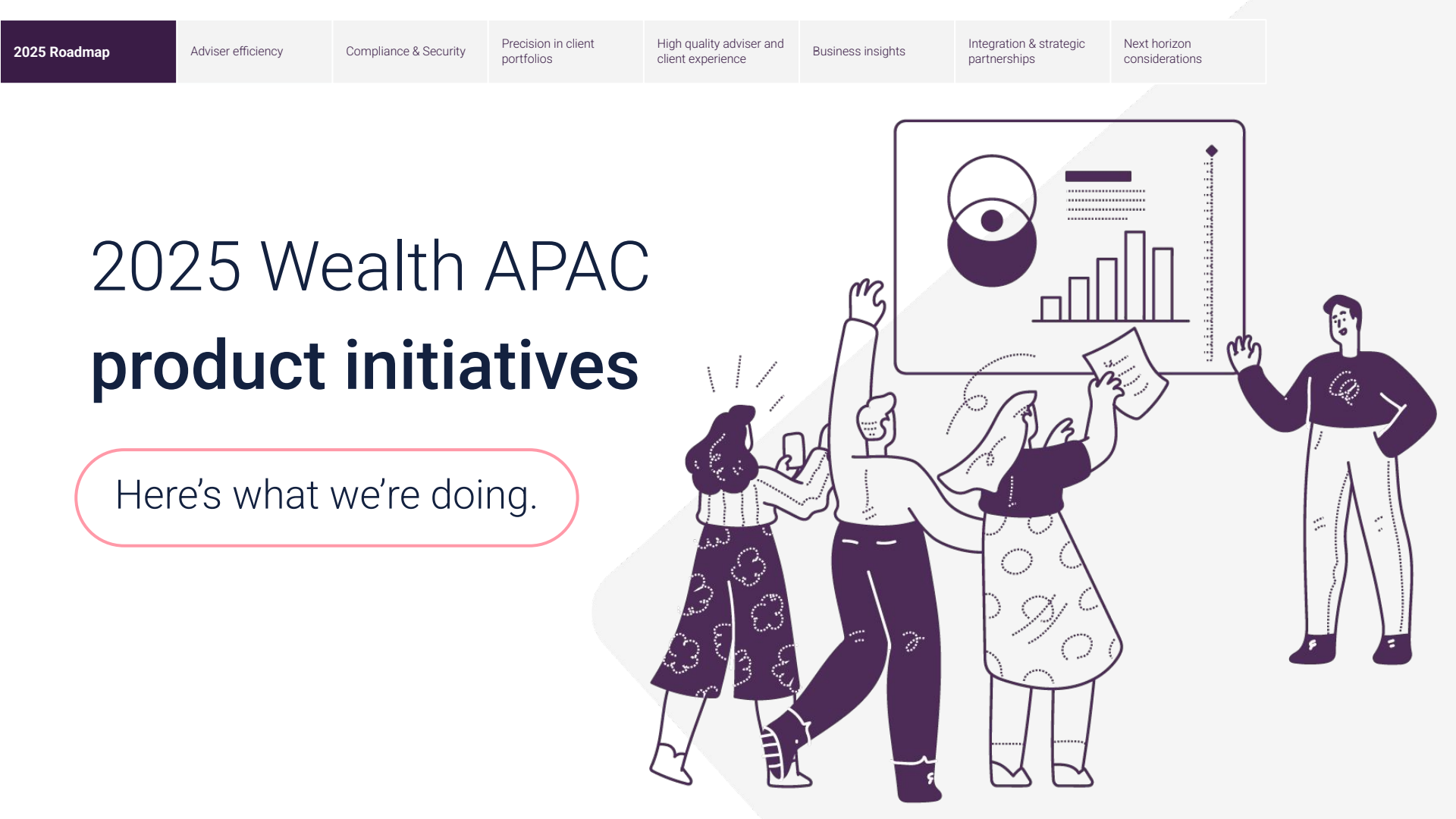
Increasing the comprehensiveness of our modelling, portfolio & research capabilities.

Transforming adviser and client experience

Delivering better navigation for advisers and a more engaging client experience.

Powerful business intelligence and insight

Making it easier for you to understand how your business is running so you can operate more optimally.



2025 Roadmap	Adviser efficiency	Compliance & Security	Precision in client portfolios	High quality adviser and client experience	Business insights	Integration & strategic partnerships
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Seamless invoicing, effortless payments – **now in CommPay**

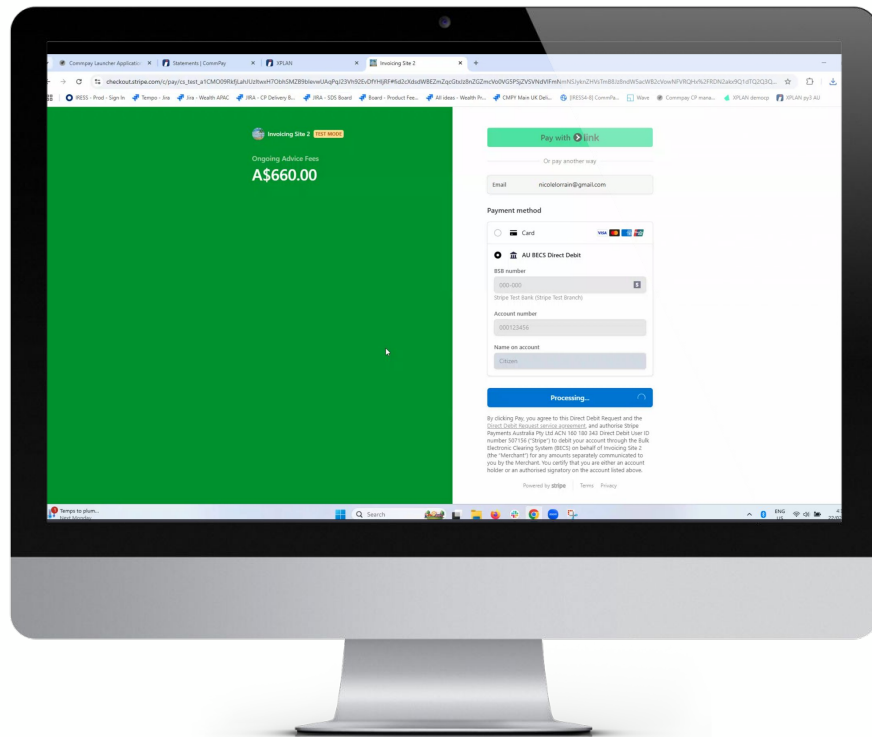
Say goodbye to manual processing and hello to seamless efficiency. With integrated invoice payments, CommPay lets you issue invoices with payment links that auto-reconcile—no file uploads, no manual matching, no hassle.

- ✓ Get paid faster with frictionless transactions
- ✓ Cut admin time and eliminate reconciliation errors
- ✓ Streamline your cash flow with a fully integrated solution

Less admin, fewer errors — just effortless payments.



[Watch the video here](#)



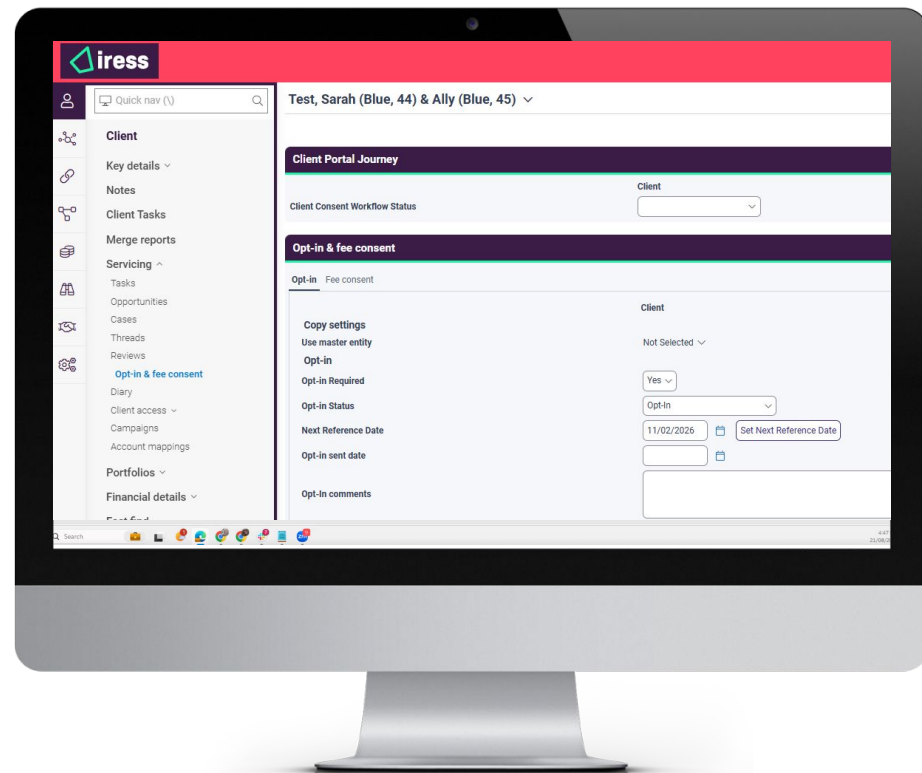
2025 Roadmap	Adviser efficiency	Compliance & Security	Precision in client portfolios	High quality adviser and client experience	Business insights	Integration & strategic partnerships
	 Response to client feedback Delivered as planned Pending delivery Delay to plan					
<div> <div> Indicates when you will see a outcome delivered </div> </div>	DELIVERED Q1/25	COMMITTED FOR DELIVERY		PROPOSED		
Client Focus		Q2/25	Q3/25			
Portfolio management	<div> <div>Enable advisers to see their holding balances in front-ends and Portfolio reports for improved transparency</div> <div></div> </div>				<div> <div>Review Xplan functionality to identify ways in which we can streamline CRM performance and usability</div> </div>	
CommPay	<div> <div>Launch an Integrated Payment Solution for Invoicing to enable secure one off payments</div> <div></div> </div>	<div> <div>Launch an Integrated Payment Solution for Invoicing to enable secure recurring payments</div> <div></div> </div>	<div> <div>Roll Integrated Payment Solution out to IFAs</div> <div></div> </div>		<div> <div>Implementation of streamlined statement delivery with automated loading between supplier & CommPay back office</div> </div>	
Xtools/Xtools+					<div> <div>Reduced manual entries with introduction of automated bank receipts via open banking integration</div> </div>	
WealthSolver					<div> <div>Reduced manual data entry when modelling Assets and Liabilities</div> </div>	
AI		<div> <div>Reduce the time spent writing and saving file notes in Xplan using AI (Pilot stage)</div> <div></div> </div>	<div> <div>Reduce the time spent writing and saving file notes in Xplan using AI (Launch)</div> <div></div> </div> <div> <div>Transcription and meeting assistance using AI (Pilot & Launch)</div> <div></div> </div>		<div> <div>Automated cashflow to minimise data entry for start of period and regular transactions</div> </div>	
					<div> <div>WealthSolver Insurance proposal integrate with Risk Researcher</div> </div>	
					<div> <div>Automate updates to Xplan client data using AI from document upload (e.g. statement, payslips)</div> </div>	

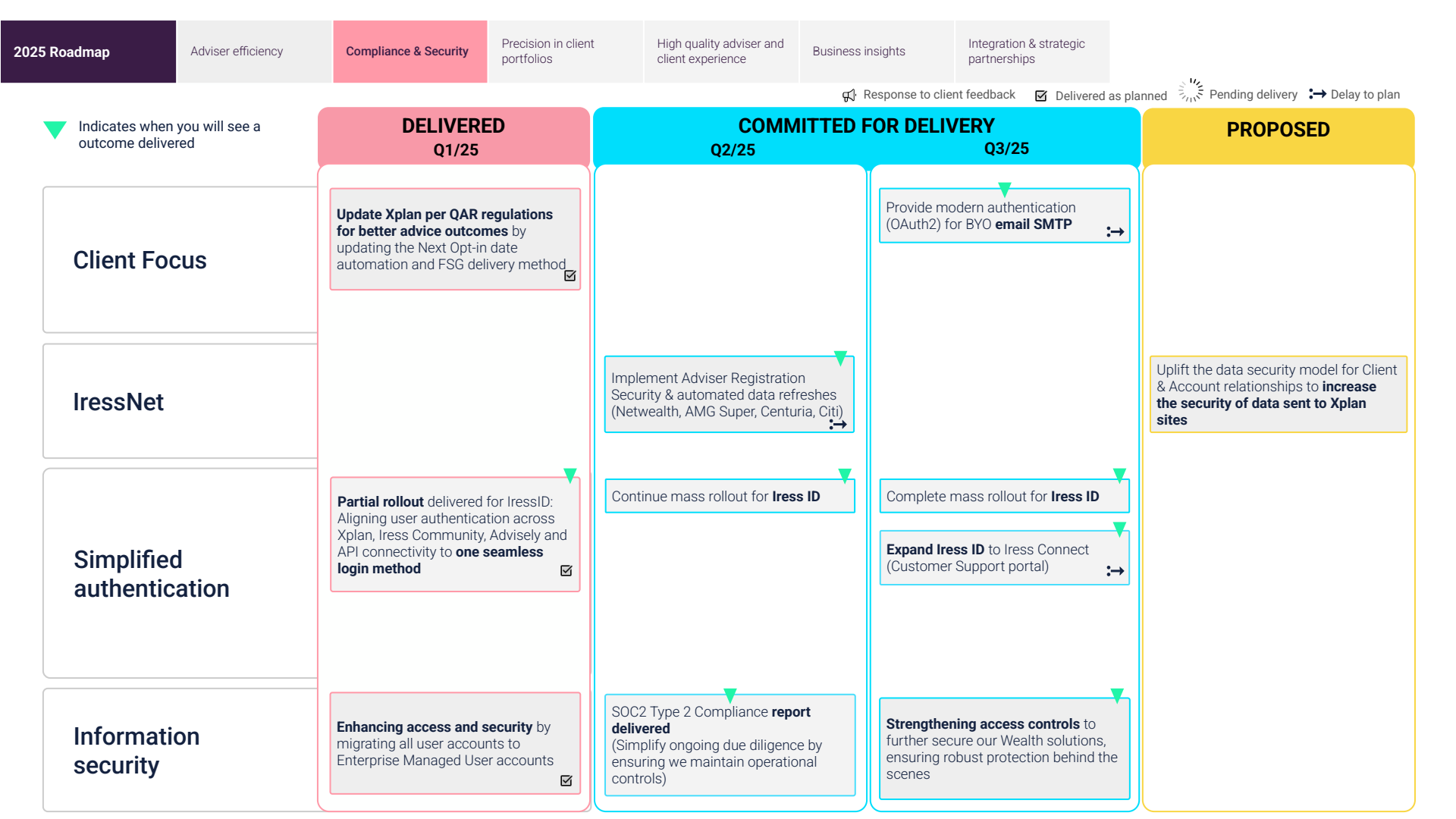
Ensuring compliance with evolving regulations

Xplan is evolving to support the Quality of Advice Reforms (QAR) in Australia.

Updates will streamline ongoing fee consent, enhance FSG disclosure flexibility, and ensure compliance with conflicted remuneration and insurance commission rules.

Iress is committed to keeping Xplan aligned with industry expectations, so advisers can focus on delivering high-quality, compliant advice.

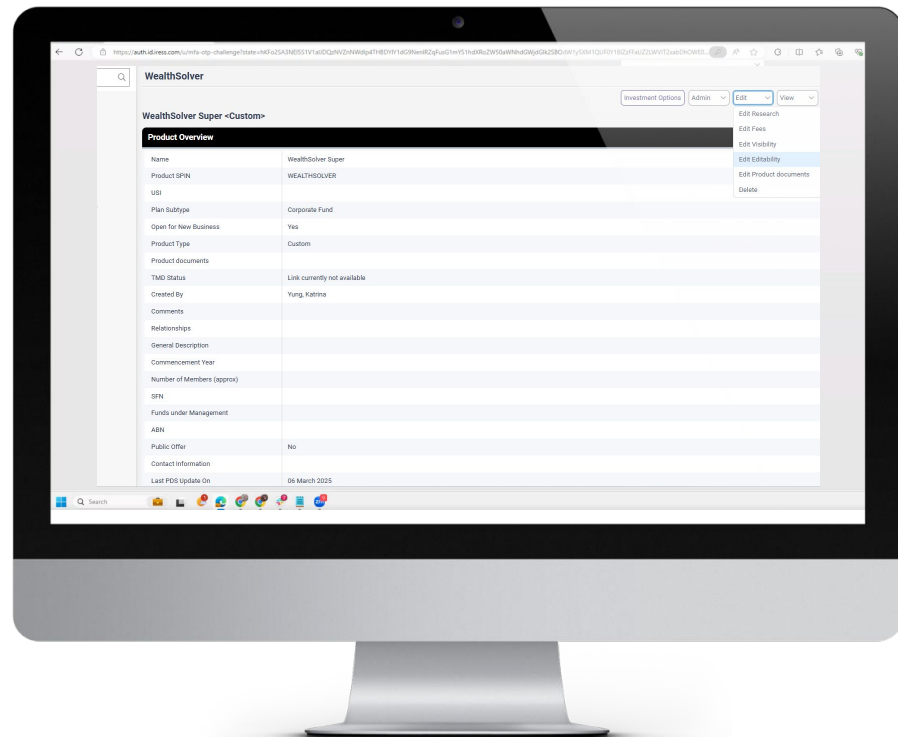




Enhanced control over derived plan editing in WealthSolver

We've heard you! Based on your feedback—66% of which has been actioned—we've introduced an editability setting for Derived Plans, giving you more control.

Now, users can only edit a Derived or Custom Plan if they have the right permissions and visibility, ensuring greater security and accuracy.

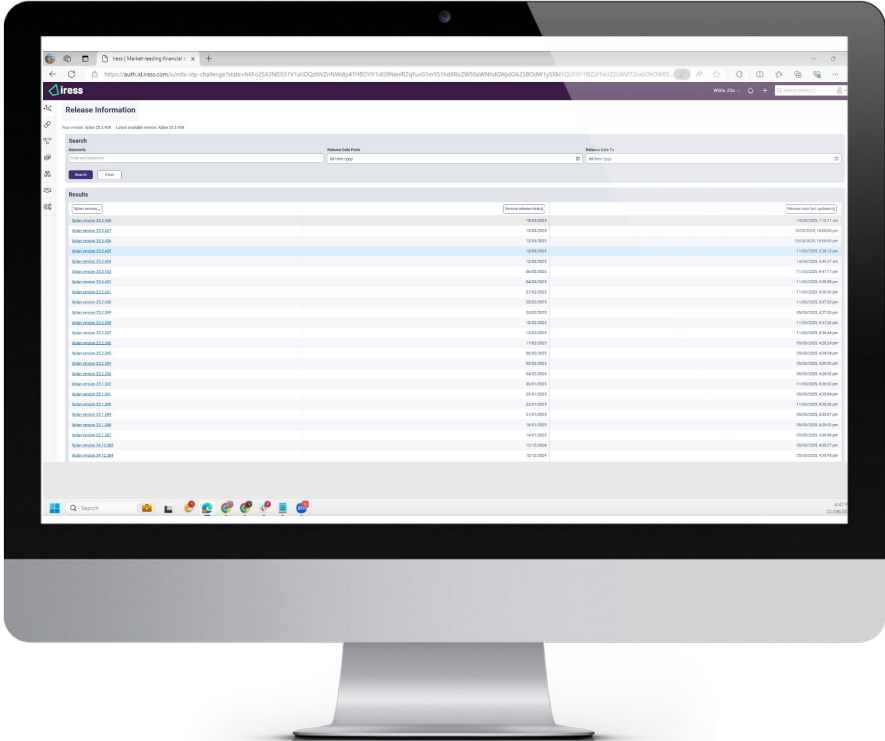


Stay updated with Xplan Release Notes!

Finding release notes in Xplan just got easier! Now, you can search by keyword to quickly find what you need.

Next quarter, we're adding email notifications — so you'll never miss an update.

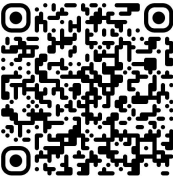
 [Watch the video here](#)



Xplan Business Insights is coming

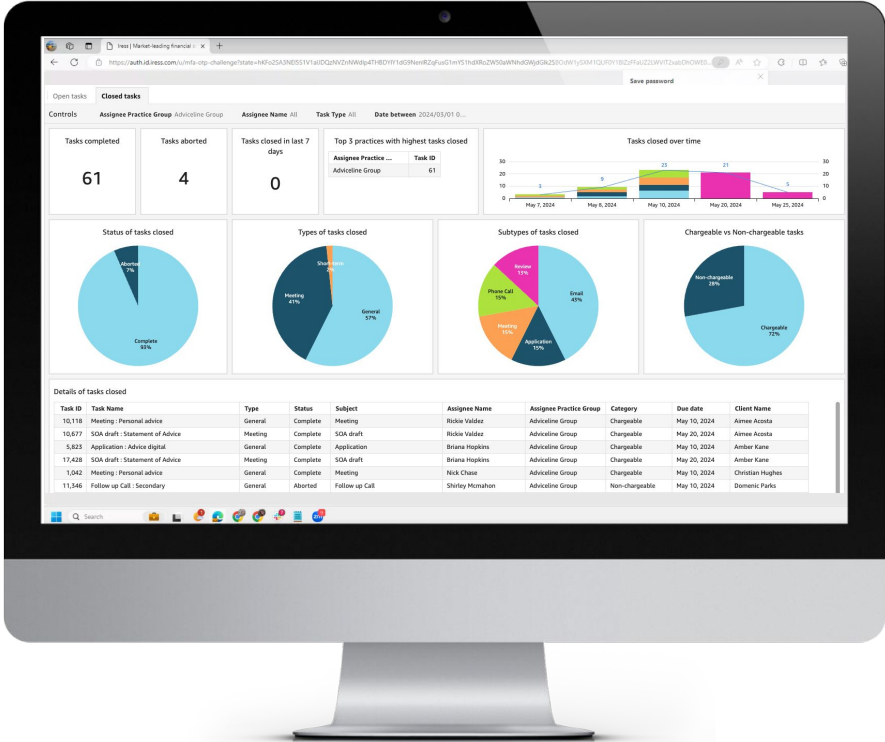
Last year, we built the foundation for powerful business insights in Xplan. This year, we're developing a self-service BI platform for real-time operational data.

To ensure a secure, fit-for-purpose data lake, we're refining the design based on client feedback. While this has adjusted our timeline, it strengthens the solution. We completed Discovery in Q4, kick off our Pilot in Q2, and aim for a full rollout by year-end.



Keep up-to-date on the XBI pilot!

Scan the QR code if you are interested in staying abreast of our new data solution.

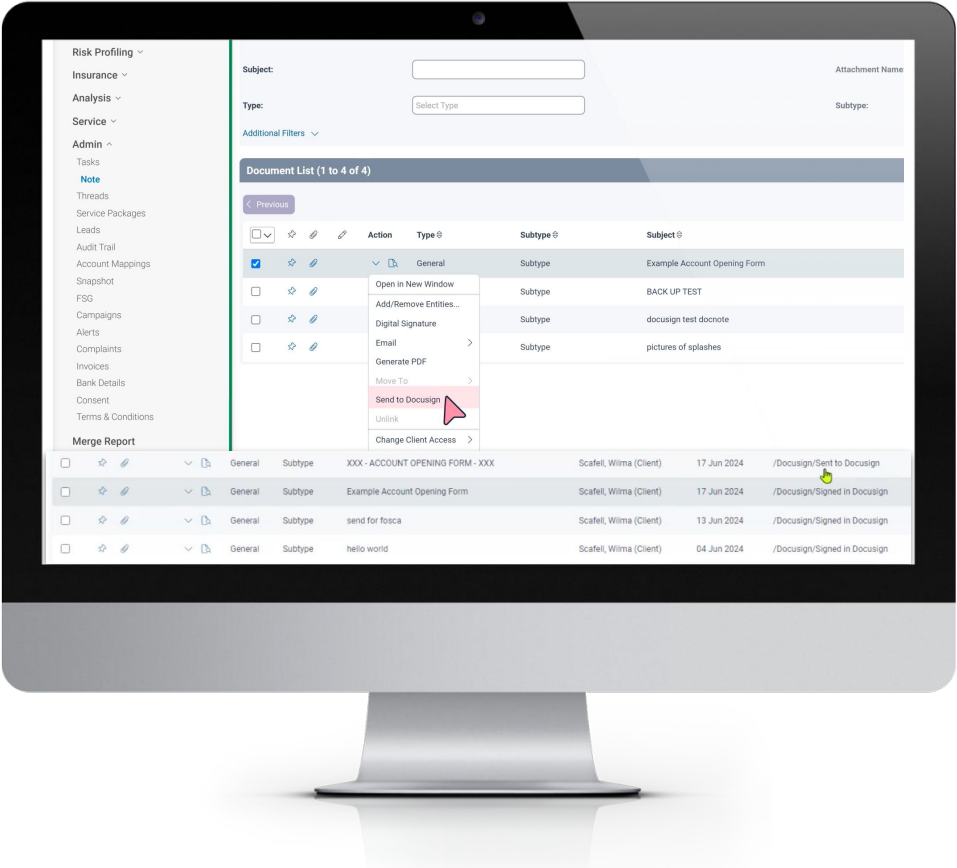


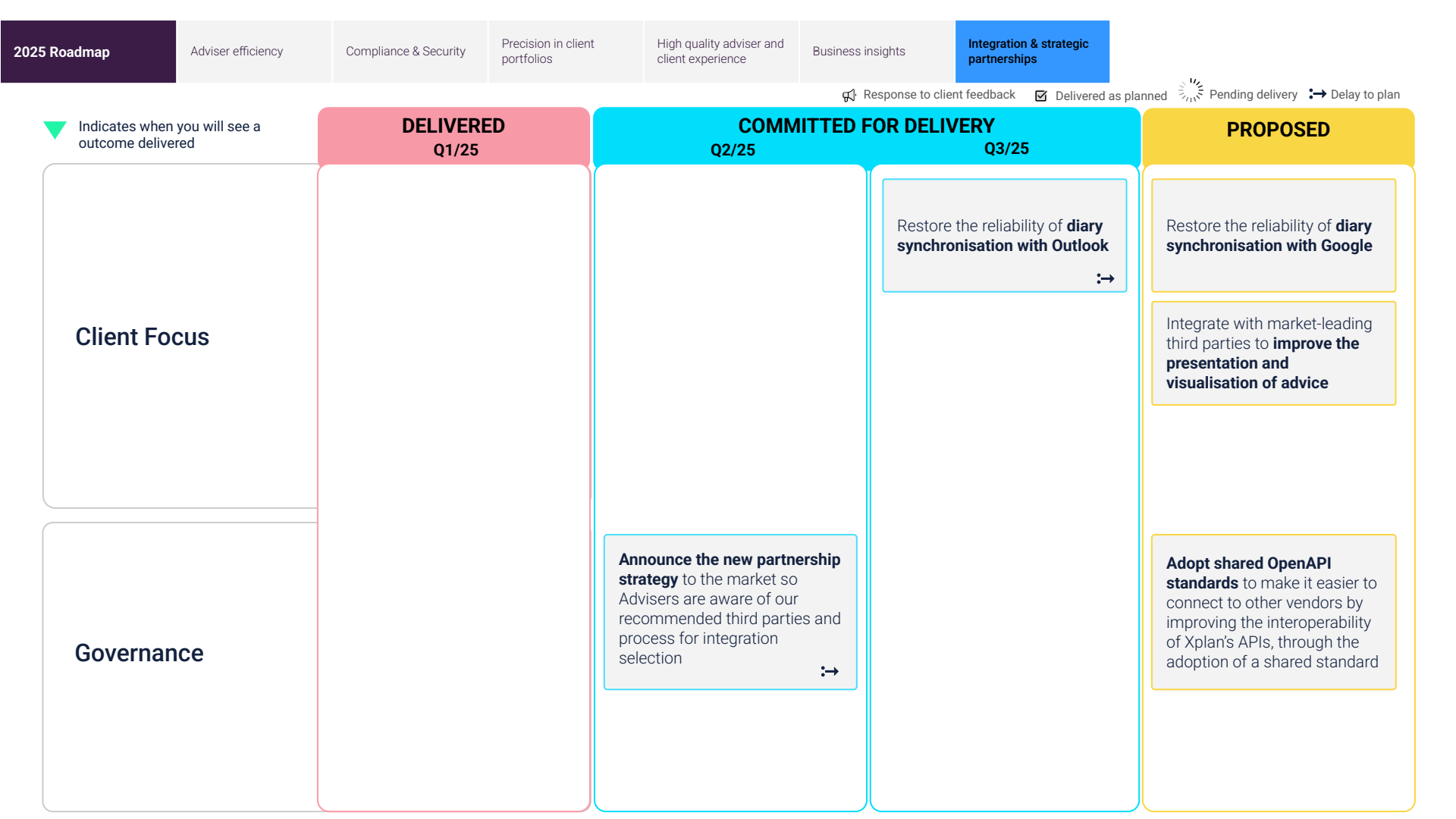
Make it **easier** to track the **processing status** of each datafeed

Our integration ecosystem is evolving

This quarter, we'll share details on exciting new partnerships and enhancements to existing integrations, designed to bring greater value and efficiency to advisers.

At the same time, we're strengthening our commitment to supporting integrators as key contributors to the Xplan platform, ensuring they have the tools and resources needed to innovate and succeed within our ecosystem.





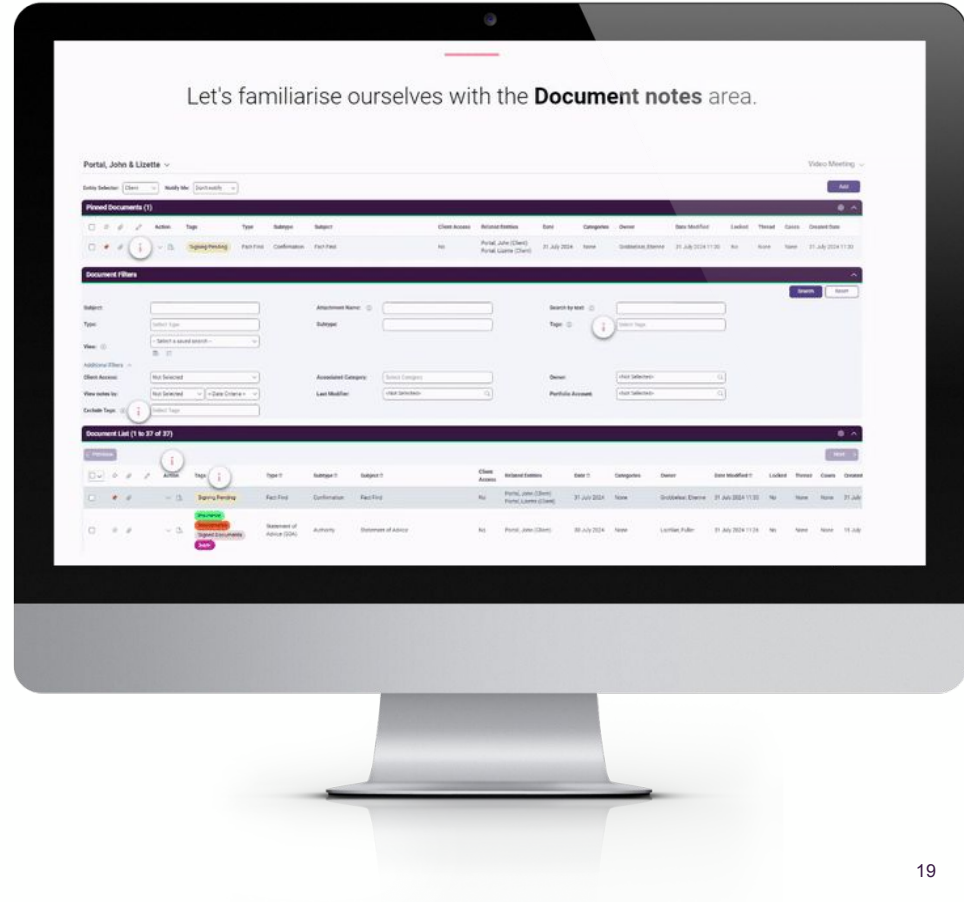
We've launched quarterly learning plans to align with our roadmap!

Get a better understanding of new features via a series of webinars, e-learning, micro-learns, and virtual classrooms.



Scan the QR code or visit the link below to access your learning plan now!

<https://learningcentre.iress.com/login/index.php>



Q&A



We want your feedback!

Scan the QR code to complete our pulse survey (no more than 60 seconds!) and share your thoughts on the roadmap.

