

**Personalised
perspectives.
Delivered digitally.
24/7.**

Client Portal

iress.com/client-portal



Tell me how it will help me

With increasing competition and digital savvy consumers comes a demand for a secure and straight-forward way for clients and advisers to engage and communicate with each other 24/7.

To remain relevant, the financial services business of today needs to deliver a professional and personalised digital experience to their clients, offering an accurate perspective of their investments and financial life. Client Portal provides a secure line of two-way communication-making it easy and efficient for you and your clients-and can be delivered at scale with ease.

Tell me what it actually does

Accessible via mobile, tablet, laptop and desktop, Client Portal is contemporary and easy to navigate-your clients can engage with their financial information and interact directly with your business through secure messaging.

You select from a suite of widgets that provide information and functionality for your clients in the front-end interfaces. With different layouts to choose from, and adaptive to your brand style, it truly becomes your front-end.

The back-end is built on a sophisticated, user-friendly content management system (CMS) that draws on data in your existing Iress systems and presents it in the front-end interface for your clients. The CMS is an easy to administer, flexible solution that delivers your digital client experience at scale.

You are able to choose one of three different views for each client. Each view comes with a range of features and sensible default options to make set-up even quicker. Our team can take you through these views and options in more detail.



“

Any digital engagement tool we adopt must be aligned to our own brand values, communicate insightful information and enrich the client experience. It must provide meaningful functionality and it must be intuitive to use. The new Client Portal from Iress delivers on this in spades.”

Cockburn Lucas Independent Financial Consulting



Can you break it down for me?

The flexibility of Client Portal allows you to choose the set-up to best suit your business and clients needs.



Front-end client interface

The front-end client interface presents information in a contemporary, visual format that's simple to use across mobile, tablet, desktop and laptop (mobile iOS app coming soon). Developed in collaboration with clients—using our Iress Labs co-design approach—the information and functionality that clients want is presented how clients want it.

Suite of widgets

A suite of widgets, from three distinct modules, can be configured in your Client Portal. Many widgets are available now and more are in development. The three modules are:

1. **Account Information**—giving your clients a complete perspective of their financial life.
2. **Advice**—professional services focussed on improving the onboarding and servicing experience for wealth management and mortgage clients.
3. **Communication**—all you need to make two-way communication with clients seamless.

Two-way communication

Client Portal's secure messaging features allow two-way communication with your clients, including all notifications, messages, document sharing and digital signatures.

Back-end infrastructure

The back-end infrastructure, built on an enterprise grade content management system, allows you to build and administer your Client Portal with ease, minimal training and in as little as a few hours. You choose how the portal looks by selecting appropriate themes, layout and branding. In addition, you select the widgets that you want based on the information and functionality you want available to your clients.

Data storage

The system draws data stored in your existing Iress systems and presents it to your clients in the Client Portal interface. Data created or changed by the client in the portal is fed back and stored against their file in your Iress system. The data is always housed and available via the secure Iress systems.

Analytics

Real-time usage stats and rich data analytics measures your client engagement and provides insights for possible action or changes.

Can you draw a picture for me?

Front-end/client interface



Account information widgets

Giving your clients a complete perspective of their financial life.



Advice widgets

Professional services focussed on improving the onboarding and servicing experience.



Transaction widgets

Providing your clients the ability to perform certain transactions themselves.



Two-way comms widgets

All you need to make two-way communication with clients seamless.

Back-end/administration



Branding and theming

A range of out-of-the-box website themes to choose from, as well as option to create your own.



Secure login

Password protected, policies, disclaimers.



Automation

Secure data transfer between front-end client interface and Xplan (or third party sources) where data is stored.



Analytics

Real-time usage stats and rich data analytics.

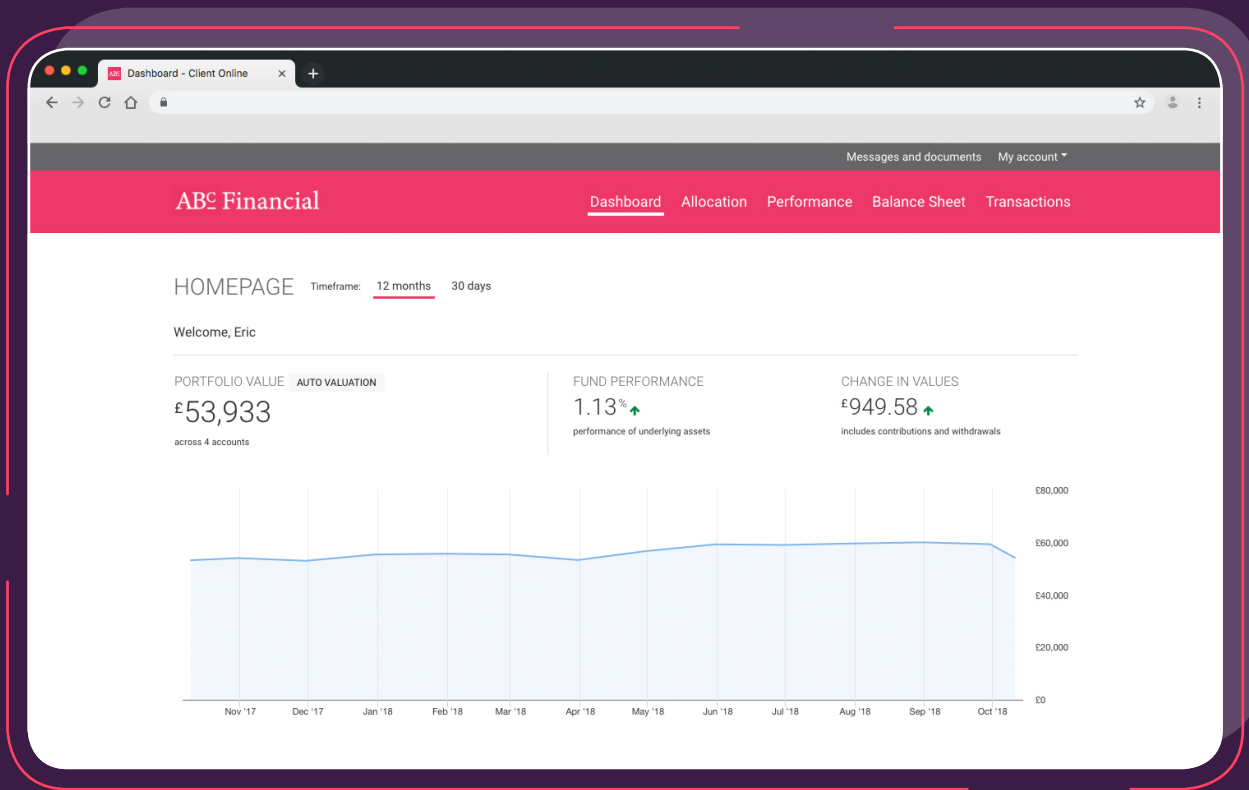


Marketing

New ways to distribute your marketing messages and company communications.

Content Management System

Give me five reasons why I should use it



Client portfolio homepage provides an at-a-glance view of portfolio valuation, fund performance and change in values.

1

Flexible

Configured to your requirements and brand and with customisable content from an array of widgets for an interactive experience.

2

Secure

All data and documents stored in your existing secure Iress systems.

3

Smart

Automated processes, comprehensive usage analytics and context aware content allow you to easily adjust and respond to client needs.

4

Simple

Easy for you to administer and user friendly for both you and your clients.

5

Integrated

Integrates with Iress systems, third-party data sources and software applications.

What widgets can clients access in the front-end interface?

Advice module

Professional services focussed on improving the onboarding and servicing experience for financial advice and mortgage clients:

- Annual review check-in
- Suitability assessment
- New client pre-meeting questionnaire
- Wealth management fact find
- Mortgage fact find

Communication module

All you need to make your communication seamless, including:

- Contact adviser
- Push notifications
- Secure messaging
- Digital signatures
- Online / video meetings
- Contact preferences

Transactions module

Future releases will provide your clients with the ability to perform certain transactions themselves.

Account information module

Giving your clients a complete perspective of their financial life:

- Personal details
- Documents
- Portfolio investments
- Portfolio valuation
- Portfolio allocation
- Portfolio performance
- Transaction history
- Valuation reports
- Third-party data (e.g. open banking data)
- Total wealth / net position
- Asset / liability summary

This is a full list of widget functionality, many of which are available already and some of which are in development for imminent releases. Our team can give you the most up to date information.

What about service and support?

We understand providing great service and support goes hand-in-hand with delivering great software.

We pride ourselves on our thorough and timely implementations, reliable and scalable hosting services, robust back-up and recovery procedures, and ISO/IEC certified information security management.

Our expert-led support team, training programs and online user community all help our users get the most out of our software.

How does Iress stack up as a technology partner?

Every day, more than 9,000 financial services businesses use our software to make better decisions and deliver better results. We know they don't just expect software that works, they also want a technology partner that works with them.

Leveraging our industry knowledge and global experience working with clients just like you, we design, develop and deliver creative, reliable software that does what you need it to.

At Iress, we believe technology should help people perform better every day.



iress.com

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