Financial advice. We’ve got it covered.

Financial advice

iress.com/financial-advice

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Tell me how it will help me

The technology your business relies on should work for you, not against you.

Designed for advice businesses of every size, our software helps financial advisers everywhere improve their business performance, comply with regulation and risk management demands, build stronger client relationships and deliver quality advice more efficiently.

If you're looking for financial advice software that drives performance, we've got you covered.

Give me the highlights

- Our software supports the entire advice process, bringing advisers closer to clients and helping with the management of business operations and risk.
- Suitable for advice businesses of any size, from the smallest firms to the largest networks.
- Appropriate for all types of personal financial advice.
- Supports every stage of the advice journey, from discovery to implementation and ongoing management.
- Easily adapted to every business type and scalable as a business grows.
- Delivers a return on investment by streamlining processes and improving how businesses perform.

Trusted by 9,000 businesses worldwide

100,000 users globally

Unrivalled breadth and depth of functionality

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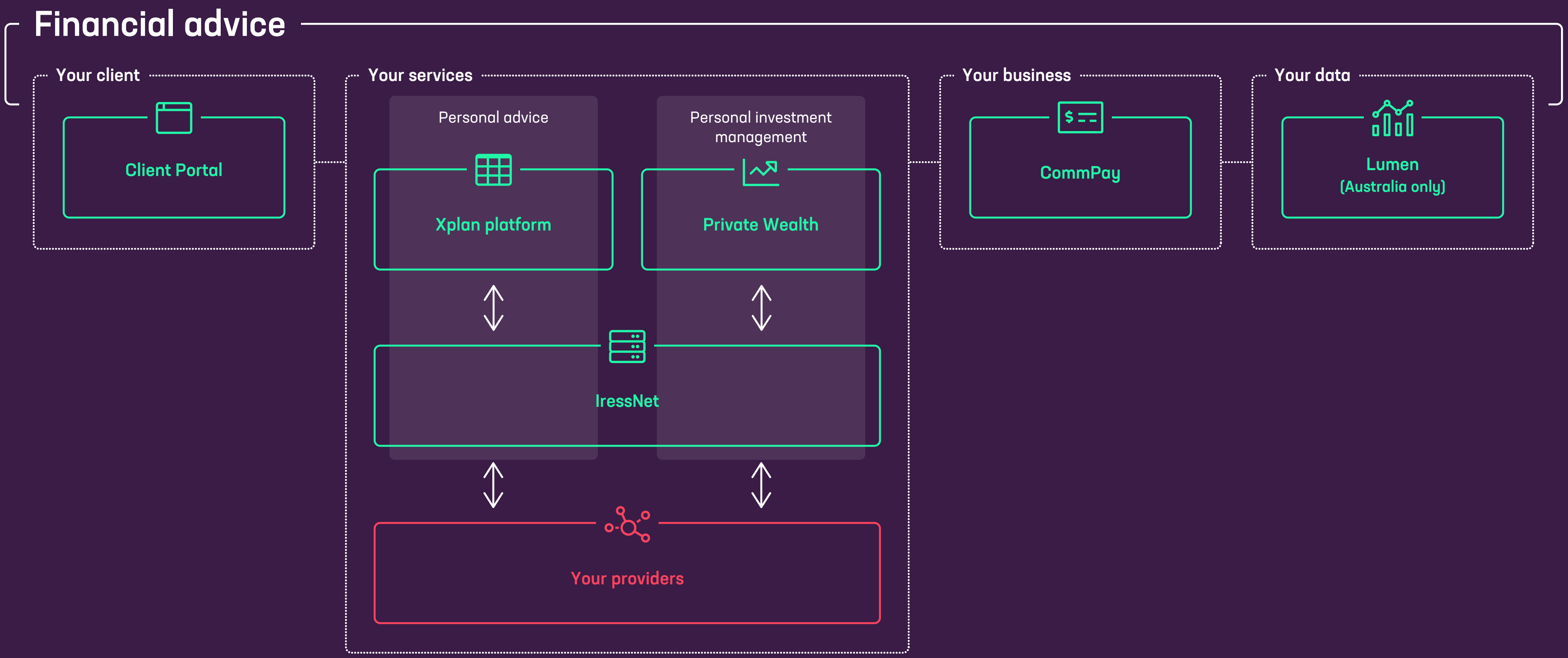
Can you draw a picture for me?



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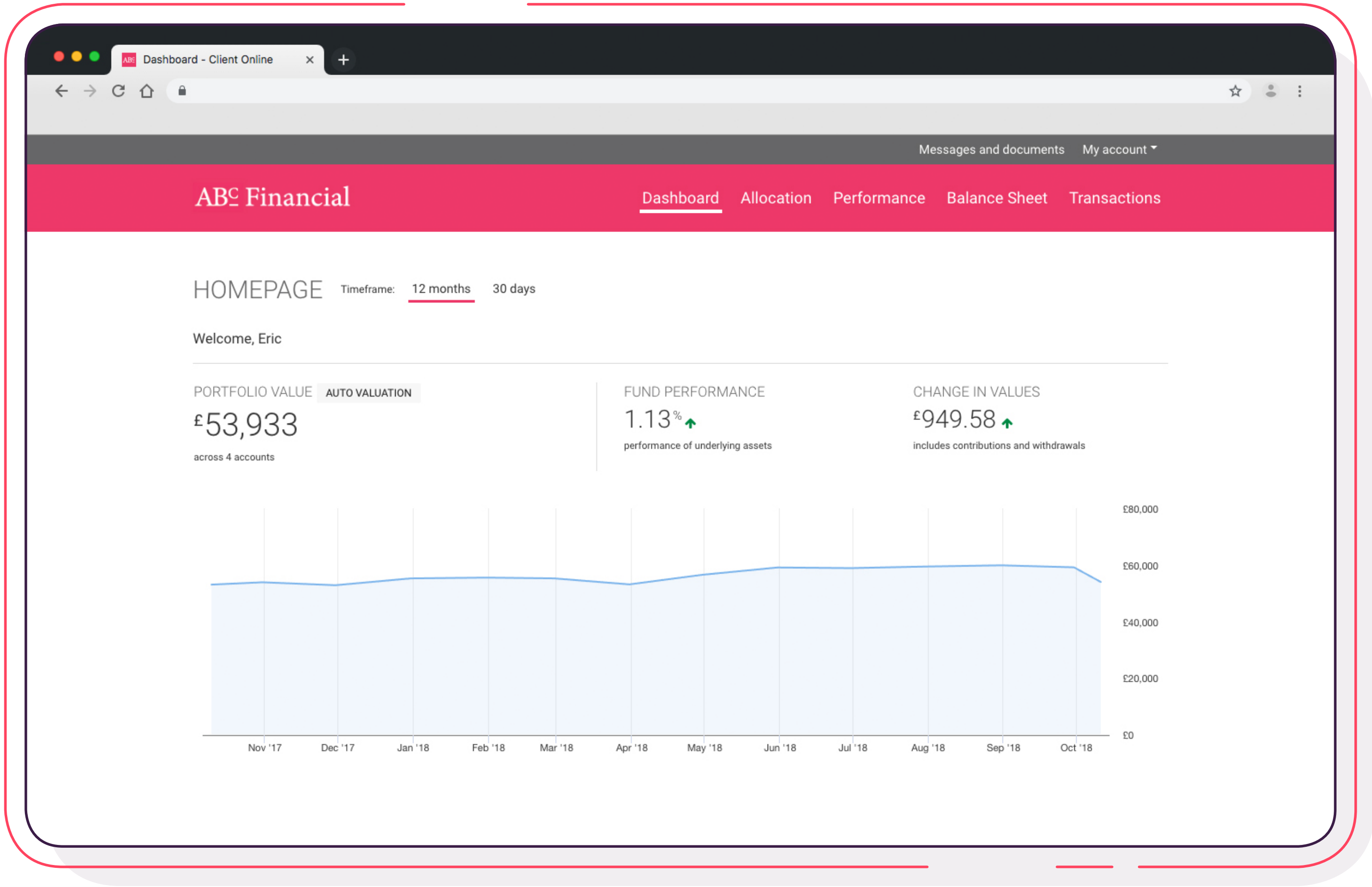
Can you break it down for me?

Client Portal

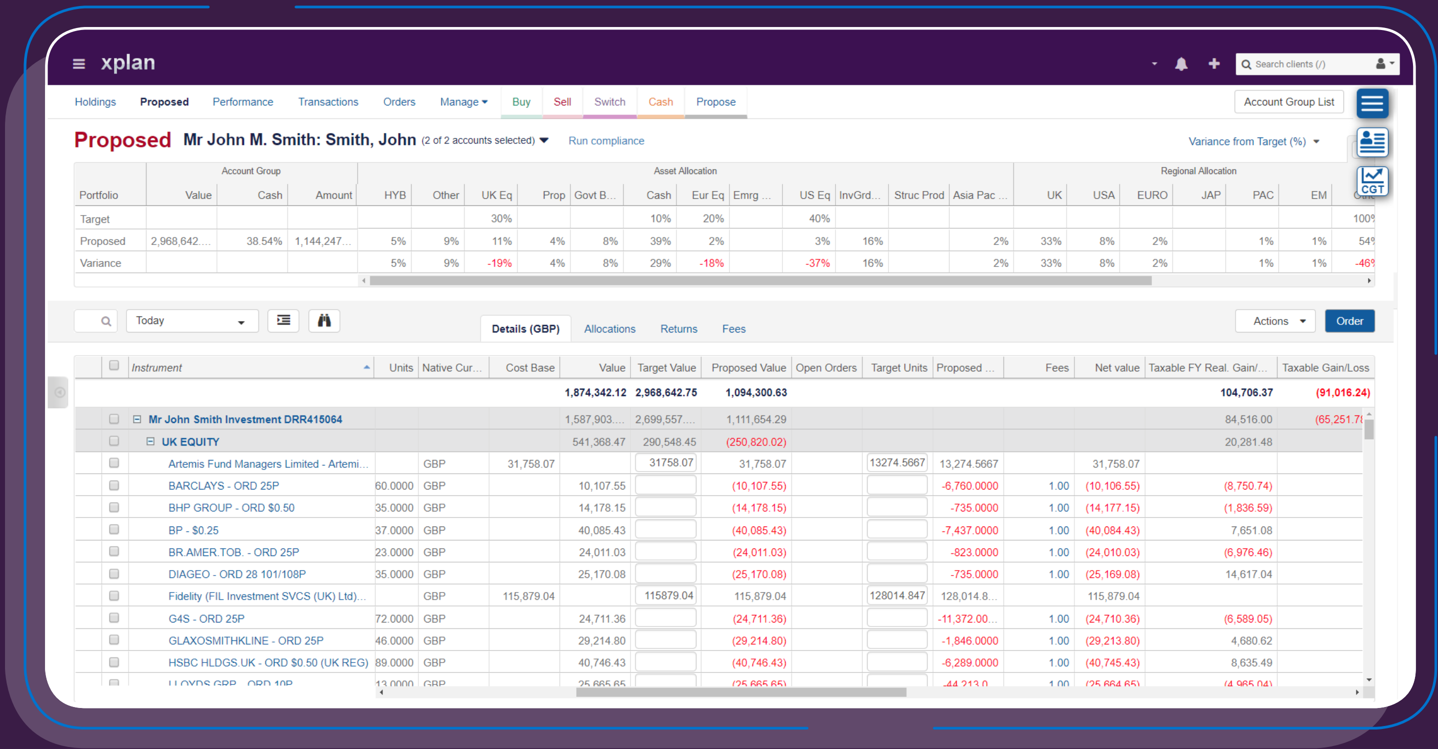
Accessible via mobile, tablet, laptop and desktop, Client Portal is contemporary and easy to navigate—your clients can engage with their financial information and interact directly with your business through secure messaging.

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, enterprise-grade 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.



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



View a client's entire portfolio.

Xplan

A complete and comprehensive financial planning and wealth management software for advice practices of any size—from the smallest IFA to the largest network and nationals.

Supporting all types of advice, from simple through to complex needs, Xplan allows you to manage the entire advice process from discovery, current position, goal-setting, analysis, strategy development, production recommendations, advice documentation through to implementation and ongoing review.

All of your client data and documentation is stored in one central system with full workflow management capability and comprehensive reporting for business management.

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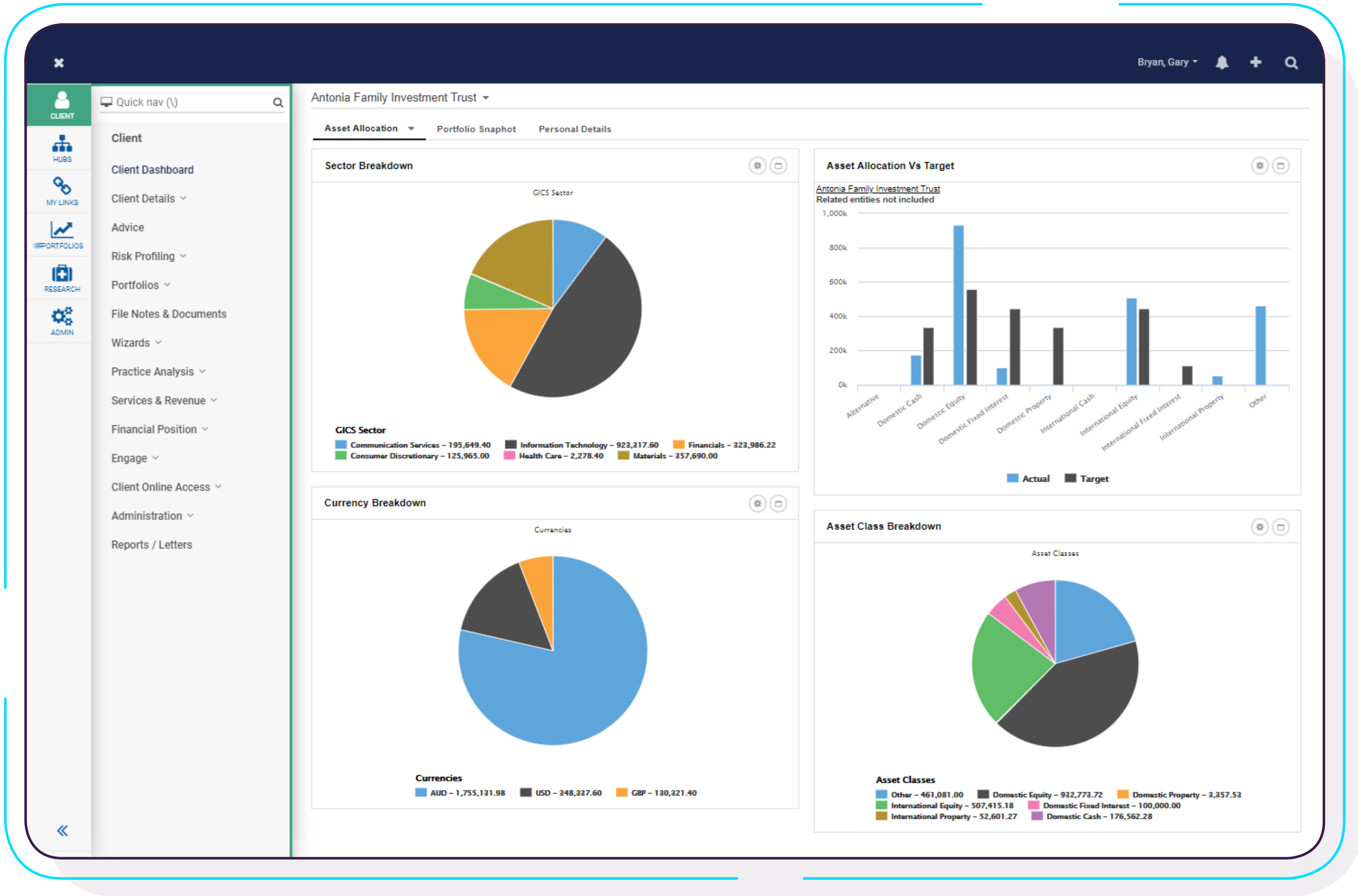
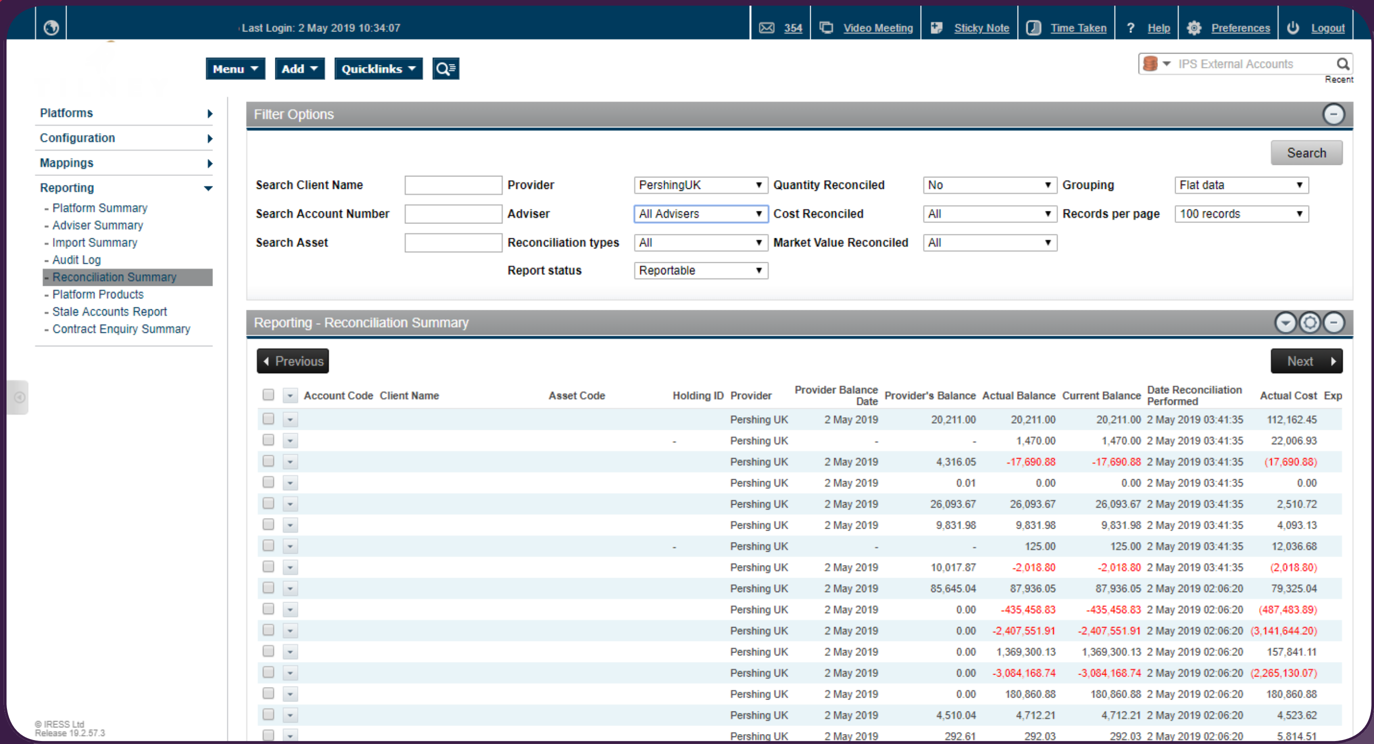
Private Wealth

This 100% web-based, fully hosted and managed software is tailored to the specific client and workflow requirements of personal investment managers.

It seamlessly integrates client and portfolio management, together with advice and order execution. With one client view, Private Wealth supports your entire service proposition, saves time and reduces risk.



Summary dashboard of key client information.



IressNet

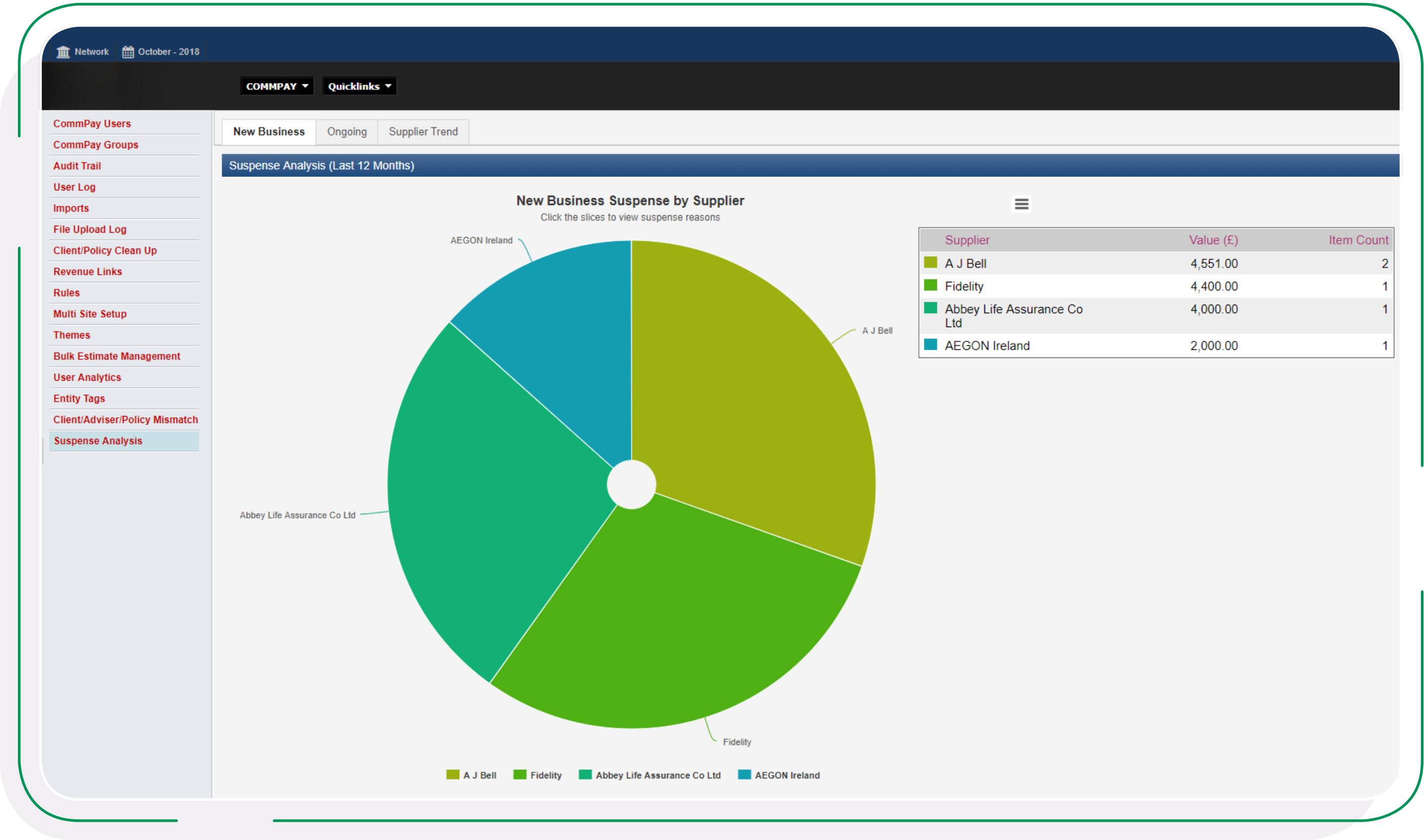
IressNet is centralised infrastructure hosted by Iress that automates the collection, validation and reconciliation of key client data (held by third-parties, such as investment funds) and passing to your Xplan site.

IressNet's datafeeds remove the lengthy process of collection and reconciliation of key client data and provides you with an understanding of what has been received from providers and other sources—and most importantly what hasn't been received—on a daily basis.

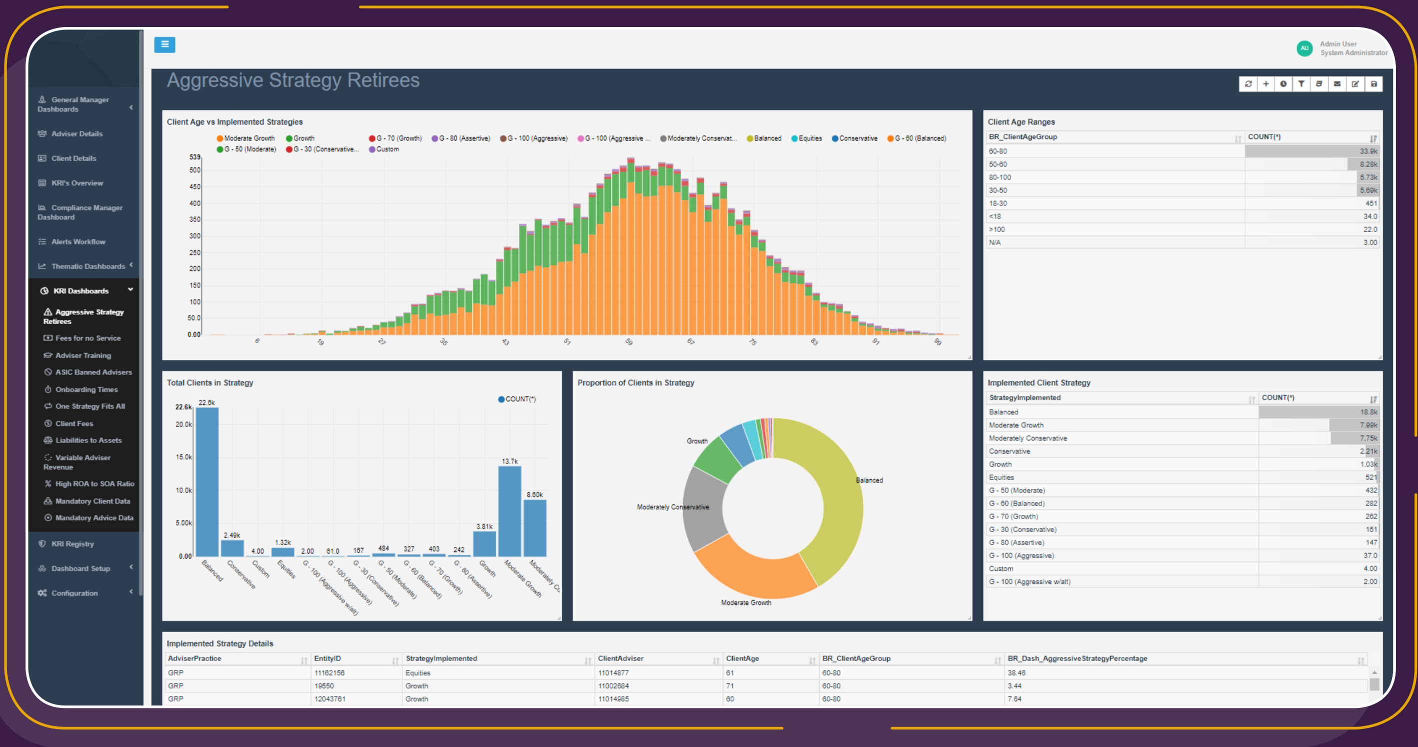
CommPay

Effortlessly streamlines and automates all areas of your revenue management in one place.

From uploading supplier statements to invoicing, reconciliation and reporting—these can all be executed using CommPay.



Suspense Analysis—New Business screen.



View all clients under a licensee by age & implemented strategy.
Used for the retirees in an aggressive strategy KRI.

Lumen (Australia only)

Lumen provides you with data-driven analytics for compliance and key risk indicator (KRI) monitoring, together with interactive dashboards, automated alerts and reporting.

With this in-depth view of the operational and compliance performance of your license—and your authorised representatives and overall network—you can identify and manage potential risks.

Unlike other systems that simply store and retrieve data, Lumen provides insights and outputs so you don't need to assemble information and draw your own conclusions.

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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.

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Australia - Asia - Canada - New Zealand - South Africa - United Kingdom