

IRESS to launch digital tools through XPLAN for advisers

Financial technology business IRESS has announced it will launch next-generation digital tools through XPLAN from early 2018.

The new digital capability in XPLAN will help advisers put the right information and tools in their clients' hands, catering for an increasingly flexible, consumer-led market. It will enable financial advisers to complement their face-to-face propositions with customer-centric, digital functionality, providing advisers' clients with the choice to engage wherever and whenever they want to. It will also provide advisers with a more cost-effective way to provide advice and ongoing servicing to clients.

The new offering meets the needs of advisers and their clients by offering improved visibility and accessibility to the clients' portfolio and performance data, as well as allowing access to several aspects of the advice process including viewing key documents, financial goals and cash-flow management. Planned developments also include secure client-adviser correspondence, tailored dashboards and newsfeeds, appointment booking and 'ring-fenced' trading capabilities for a portion of client portfolios, bringing a personalised experience to the digital advice process.

IRESS has also recently expanded its digital development team, with the appointment of Richard Ross as Digital Product Manager.

Andrew Simon, IRESS Executive General Manager (Product), said: "Advisers are seeking to adopt digital tools to better engage and inform customers in the advice process through increased transparency and greater client ownership. This digital capability will help XPLAN users to grow their business through new channels and achieve business efficiency. XPLAN will underpin advice propositions and help advisers realise the business potential of an integrated digital advice channel.

"The new capability is being co-designed with advisers and their clients. The offering will also be branded and configured for individual advice groups and institutions based on particular compliance regimes and existing advice workflow. For advisers that already have their own client portal, IRESS can offer XPLAN digital tools as an API (Application Programming Interface), which will allow them to build these elements into their own platform."

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About IRESS

IRESS is a leading supplier of technology solutions to clients in the financial markets, wealth management, and mortgage sectors. IRESS is listed on the Australian Securities Exchange (IRE.ASX) with operations in Australia, New Zealand, the United Kingdom, South Africa, Canada, and Asia.

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