Financial advice software, fully covered

United Kingdom

Introduction

Designed to support all types of personal financial advice, Iress financial advice software supports every stage of the advice journey, from discovery and implementation through to ongoing management.

Built for advice businesses of any size, from sole advisers to large national networks, the platform is scalable, adaptable and designed to improve business performance.

Trusted by more than 9,000 businesses and used by over 100,000 users globally, Iress delivers breadth and depth of functionality to help advisers build stronger client relationships, manage risk and deliver high-quality advice more efficiently.

What is it and what does it do?

Iress financial advice is a complete software ecosystem that supports the full advice lifecycle and connects advisers, clients, providers and business operations within one integrated environment.

Xplan
for financial planning and advice delivery

Client Portal
for secure client engagement and communication

Private Wealth
for personal investment management

IressNet
for automated data collection and reconciliation

CommPay
for revenue management

Business Intelligence
for reporting and insights

All client data, documentation and workflows are managed within a central system, providing a single source of truth to support advice delivery, portfolio management, compliance and business performance.

Features and benefits

End-to-end advice support

Enables consistent, compliant advice delivery across the full client lifecycle.

Supports discovery, current position assessment, goal setting, analysis, strategy development, recommendations, documentation, implementation and ongoing review.

Scalable for any business size

Supports business growth without requiring platform change.

Suitable for sole advisers, growing practices and large advice networks.

Client Portal

Strengthens client engagement and improves transparency.

Provides secure, branded digital access for clients across mobile, tablet and desktop, including real-time portfolio valuation, fund performance and secure messaging.

Private Wealth

Supports efficient investment management and advice delivery.

Fully hosted software for personal investment managers that integrates client management, portfolio management, advice and order execution into a single client view.

Xplan platform

Improves operational efficiency and advice consistency.

Comprehensive financial planning and wealth management software with centralised client records, workflows and business reporting.

IressNet datafeeds

Improves data accuracy and reduces manual processing.

Automates daily collection, validation and reconciliation of client investment data from third-party providers.

CommPay

Improves visibility and control across revenue operations.

Streamlines revenue management including supplier statements, invoicing, reconciliation and reporting.

Improved return on investment

Helps advice businesses operate more efficiently and profitably.

Reduces administrative burden, streamlines processes and improves overall business performance.

Enterprise-grade service and security

Provides reliability, security and support at enterprise scale.

Includes SOC2 and ISO/IEC certified information security, robust backup and recovery, global hosting, expert support teams and comprehensive training programs.

Support every stage of advice delivery

Visit iress.com/financial-advice or speak to your Iress Account Manager to discover how Iress financial advice can support your advice business to grow and thrive.