

**Complete. Ready to go.
Continuously managed.**

Xplan Model Office

iress.com/xplan-model-office



Tell me how it will help me

Setting up your own financial planning software can be time consuming and requires the right expertise. With Xplan Model Office, Iress delivers you a fully-managed Xplan site coupled with consultancy services, so you get the most out of Xplan faster.

Based on your business needs, this cost-effective solution provides you with the necessary tools to deliver accurate and efficient advice to your clients.

Tell me what it actually does

Xplan Model Office provides you with access to a suite of advice templates, workflow processes and reports that can be used out-of-the box or customised to meet your business requirements.

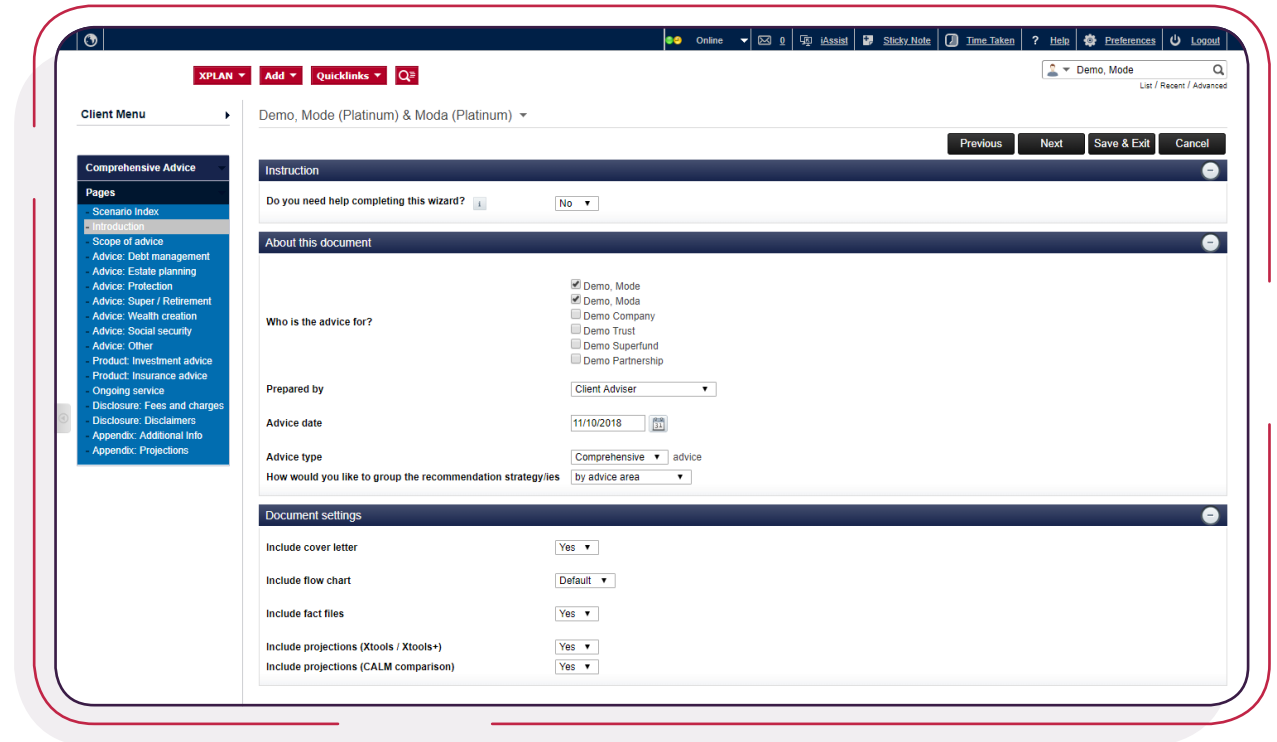
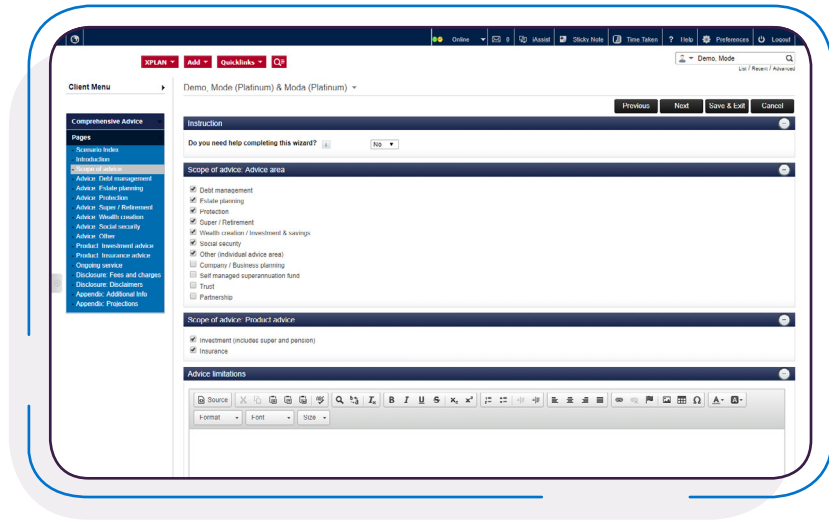
It allows you to add your own branding and disclaimers, plus the ability to make changes to text and reorder documents. With Xplan Model Office, the Iress team works directly with you to implement and get the most out of Xplan both now and in the future.





Model Office is a terrific asset to Xplan software—the support and customisation offered by Iress is second to none. It will prove its value from day one.”

Paragem



The new SoA wizard, incorporates new drag and drop options to make the advice process more efficient.

New wizard design allow for greater flexibility for multi entity advice.



Can you break it down for me?

- Advice wizards to increase efficiency of everyday processes.
- Pre-configured threads for standardised practice processes and simplified workflow.
- Practice improvement reporting functions including Funds Under Management (FUM), staff workflow and compliance reports to track the performance of your business.
- Statement of Advice (SoA) template and wizards (comprehensive, limited or risk only) including strategy text.
- Fact find document wizard maximises data entry efficiencies (with optional client portal).
- Template and wizards for Record of Advice (RoA) and client review documents.
- A suite of standard letter templates.
- Fee Disclosure Statements (FDS) with automation via CommPay integration.

What's available?

Xplan Model Office

Statement of Advice (SoA)
(comprehensive, scaled, SMSF,
risk only)

SoA summary

Records of Advice (RoA)

Client fact finds

Future of Financial Advice (FoFA)
templates

Choice of full or short form fact
find wizards

Review statement wizard

RoA wizard

Suite of letter templates

Fortnightly releases

Xplan Site Administration

Management of your Xplan
licensing requirements

Management of your Xplan
configuration

Data conversion management

Datafeed set-up and
troubleshooting

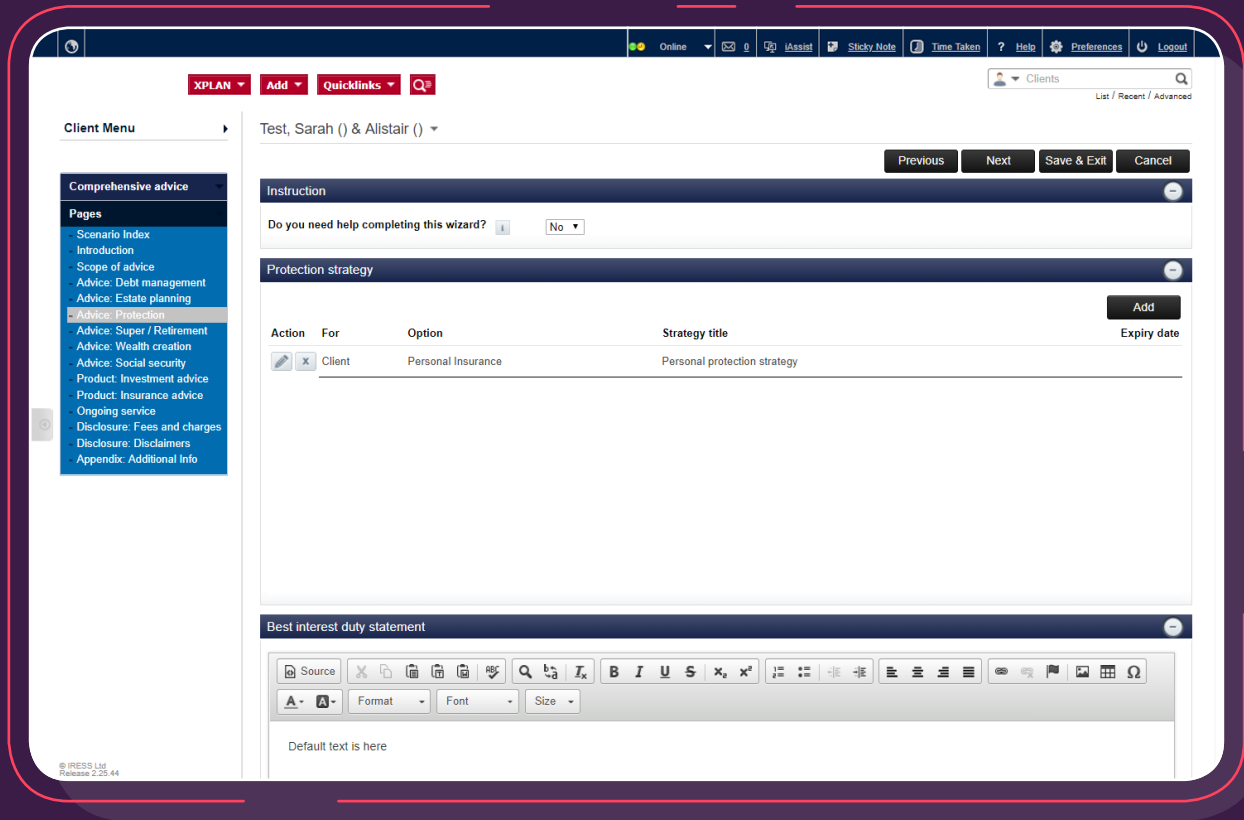
Helpdesk support and issue
escalation

Training

Face-to-face training
eLearning



Give me five reasons why I should use it



Increased configuration available to tailor the advice documents to match your requirements.

1

Ease of management

An Xplan site managed by Iress with ongoing consulting services.

2

Dedicated team

A single point of contact for all your Xplan needs.

3

Upskilling

Training to help you get the most out of Xplan.

4

Seamless transition

Assistance with management of data and transition.

5

Dynamically updated content

Fortnightly releases enhance functionality and keep you up-to-date with regulatory and legislative changes while your templates remain linked with the Xplan database.

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

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