

**Simple advice.
Done simply.**

Xplan Prime

Australia

iress.com/xplan-prime



Tell me how it will help me

Tell me what it actually does

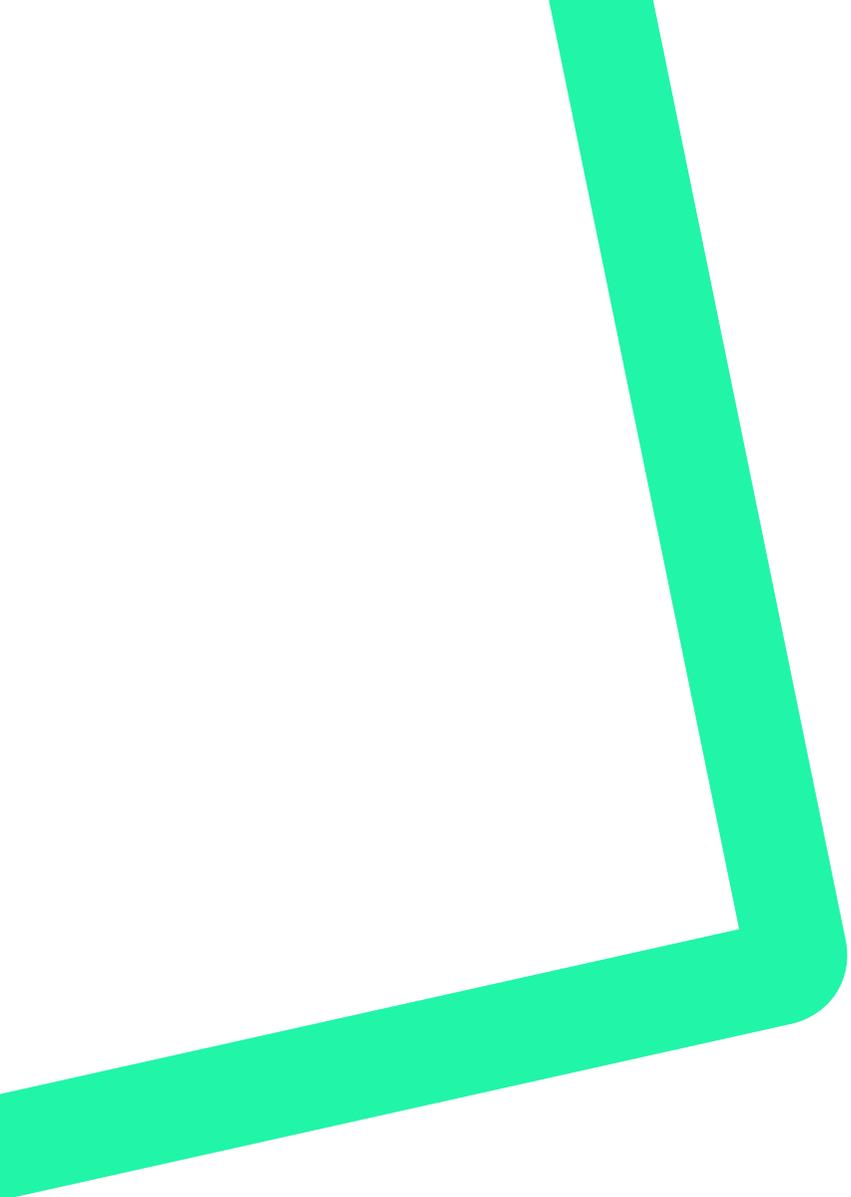


We understand that one of your biggest challenges is providing quality and compliant advice in an efficient manner to your clients with simpler needs.

Xplan Prime enables this in a streamlined and efficient process—using the underlying power of Xplan and new strategy optimisation tools. This means you can provide services that are commercially viable for your business and cost-effective for your client.

Xplan Prime is guided, objective-based advice software that streamlines the advice process for your clients with simpler advice needs. It guides you through a pre-defined client advice journey—from discovery and goal setting, current position and strategy modelling, advice documentation, implementation, and onward to progress tracking and review.

Via a single engaging and easy-to-use interface, Prime accesses Xplan's client management, modelling, portfolio, research and comparison, documentation and implementation tools. Prime gives you the flexibility you need to provide simple advice efficiently—so you can deliver quality advice outcomes to your clients.



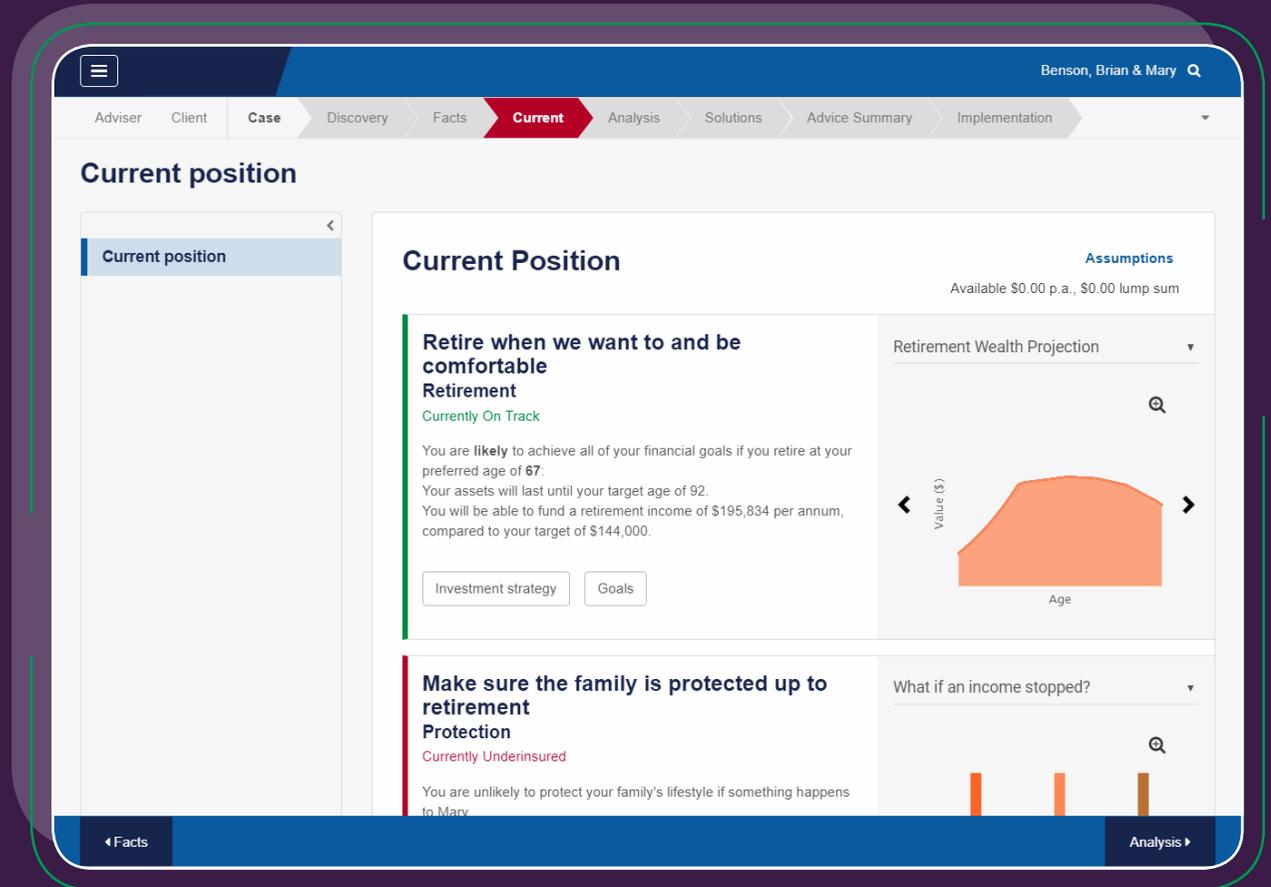
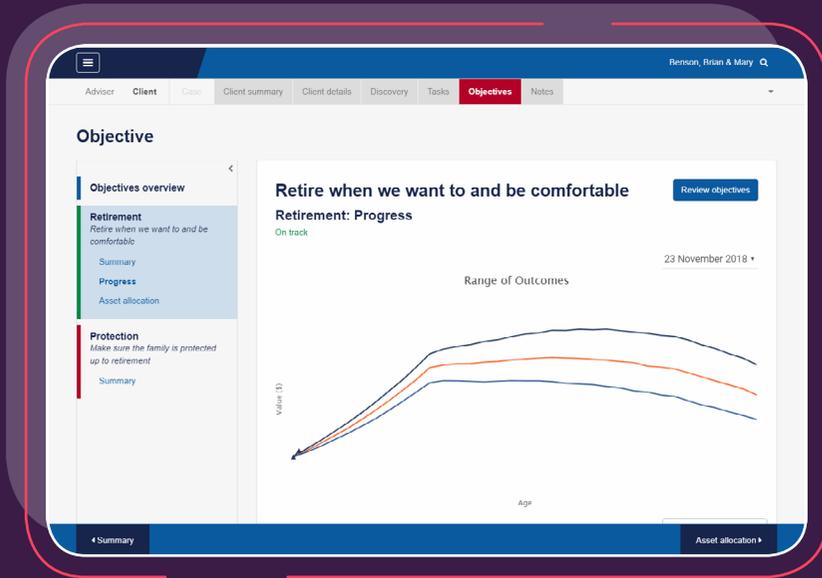
“

Xplan Prime helps our financial advisers deliver advice quickly to our members while maintaining the ability to tailor recommendations and optimise strategies for each client.”

Mine Super



Show me what it looks like



Can you break it down for me?

Objectives based advice

- Follows an advice process built around helping your clients achieve their objectives.
- Produces and documents advice in real-time with your client, or in the back-office as an advice engine after meeting with your client.
- Includes a review process to track your client's objectives, assess current strategies and make required adjustments to strategies and products.

Simple, fast and efficient

- Simplified advice process while accessing Xplan's powerful functionality.
- The seamless process increases efficiency and reduces the cost associated with providing advice.
- Allows you to service more clients and reduce the cost of advice.

Leveraging the power of Xplan

Prime accesses the following underlying Xplan modules:

- Client Focus
- XTOOLS+
- Risk Researcher
- Wealthsolver
- Portfolio

Strategy optimisation logic

- Use the optimiser modelling tool to assess options based on criteria you set and determine the most appropriate strategies and recommendations to achieve your client's objectives.
- Increase consistency of advice and reduce the time it takes you to model and compare multiple strategies and product options.

Multi-channel delivery

- Support engagement and delivery of advice face-to-face, over the phone or through digital interfaces.
- Enable provision of advice based on your client's preferences, time and budget.
- Streamline your process to provide a consistent level of service and advice across all channels.

All in one place

- One simple and intuitive user interface.
- One seamless exercise from 'know your client' to advice document to implementation, without re-keying data.
- One set of compliance rules, one set of advice documents and one client file.
- One client record provides flexibility as clients move from scaled to comprehensive advice.



Give me five reasons why I should use it

1

Powerful yet simple

Leverages the full functionality of Xplan in an easy to use interface.

2

Lower cost of advice

Streamlined process to provide simple advice faster.

3

Smart and efficient

The optimiser tool assesses strategies and products against the client's objectives.

4

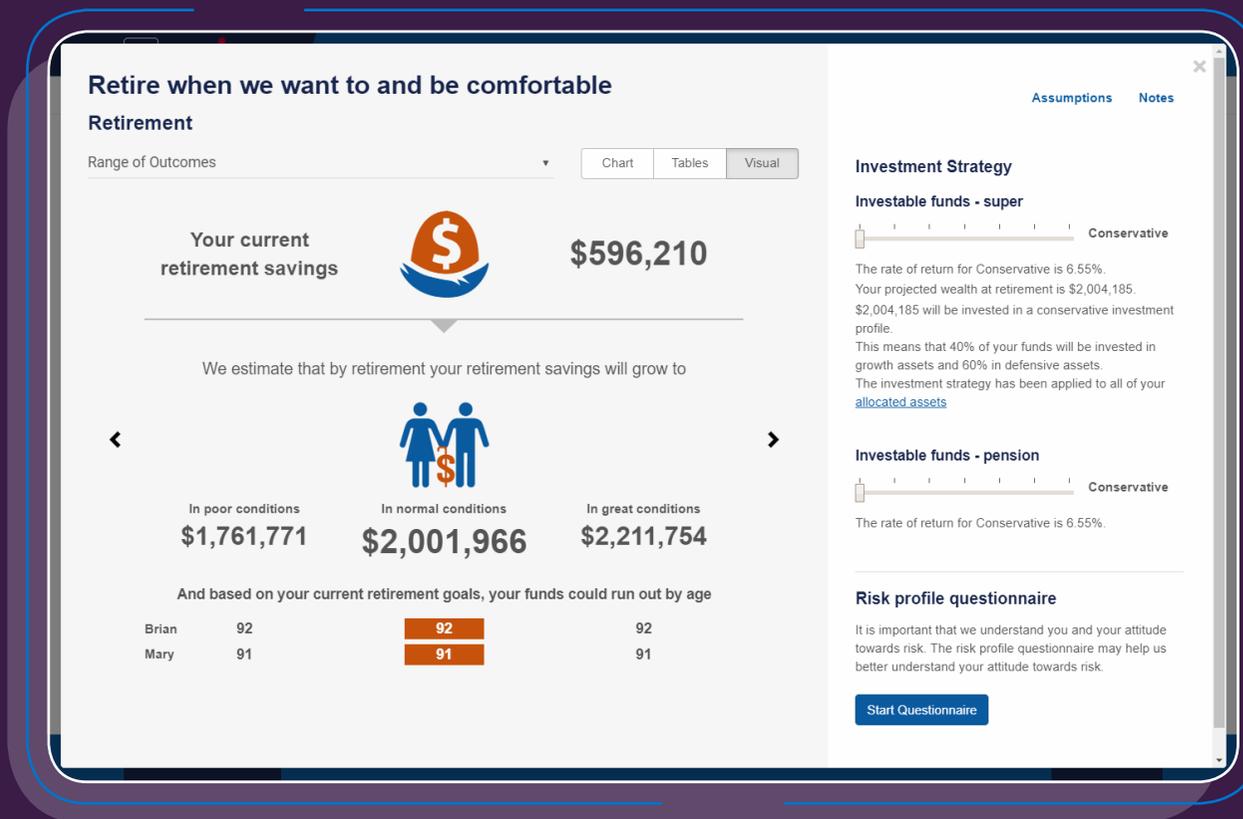
Flexible

Enables differentiated experiences while retaining a single client file.

5

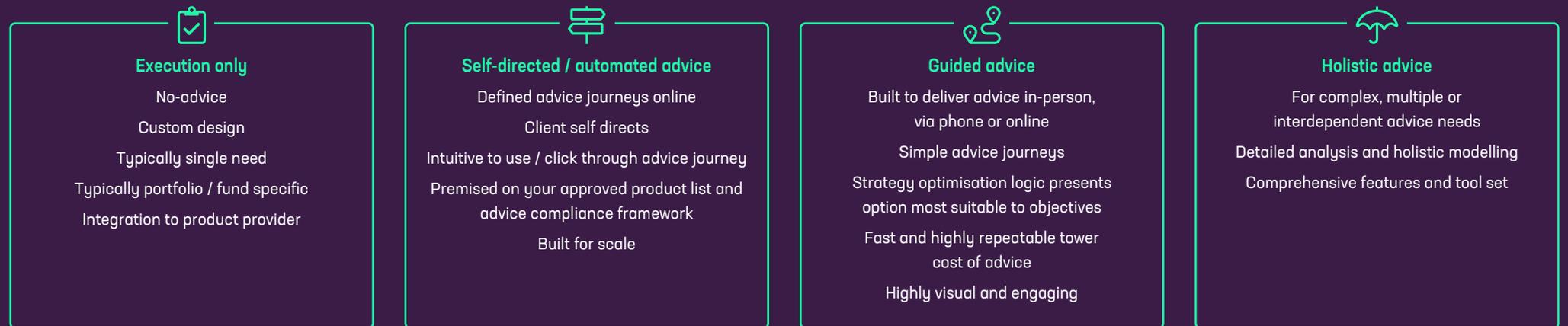
End to end

Goal setting, recommendations, documentation, implementation and review.

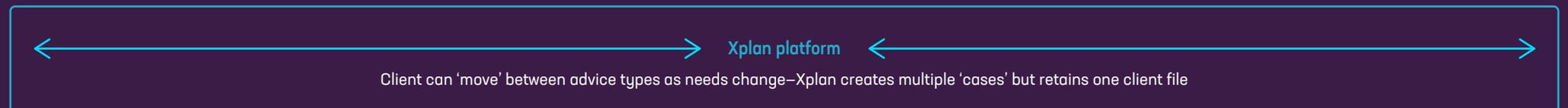


Can you draw a picture for me?

Spectrum of advice



Xplan Prime



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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