

**Source, select, submit.  
Simple.**

**Xplan Mortgage**  
[iress.com/xplan-mortgage](https://iress.com/xplan-mortgage)



# Tell me how it will help me

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**Xplan Mortgage combines both mortgage and protection sourcing on a single platform, allowing you to protect lives as part of the mortgage sale. It reduces the need to re-key and drives greater efficiencies with straight-through processing from fact find to online sourcing, and application.**

The simple signposted advice process manages risk and frees up time to create more business opportunities.

# Tell me what it actually does

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**Xplan Mortgage is a modular sourcing and advice platform, offering you everything you need to complete mortgages online.**

Our trusted and accurate sourcing software uses the same data as Trigold and The Exchange, so you're guaranteed to find the most suitable product for your client.

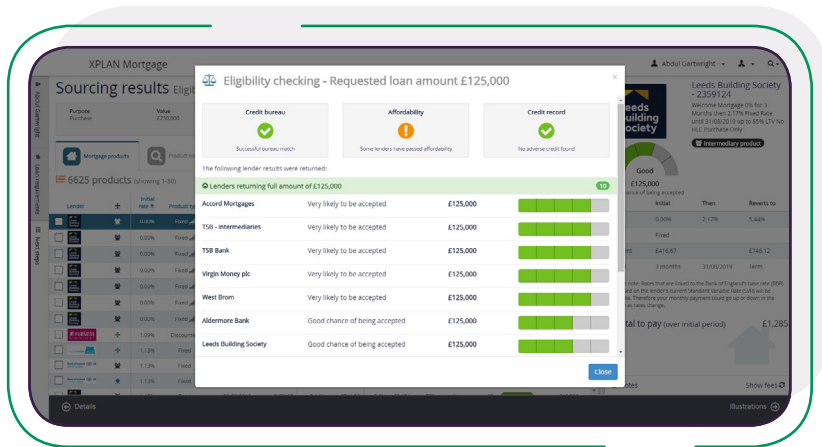
This user-friendly, multi-device compatible software is available online 24/7. With multi-user capability, your team can collaborate easily and effectively.



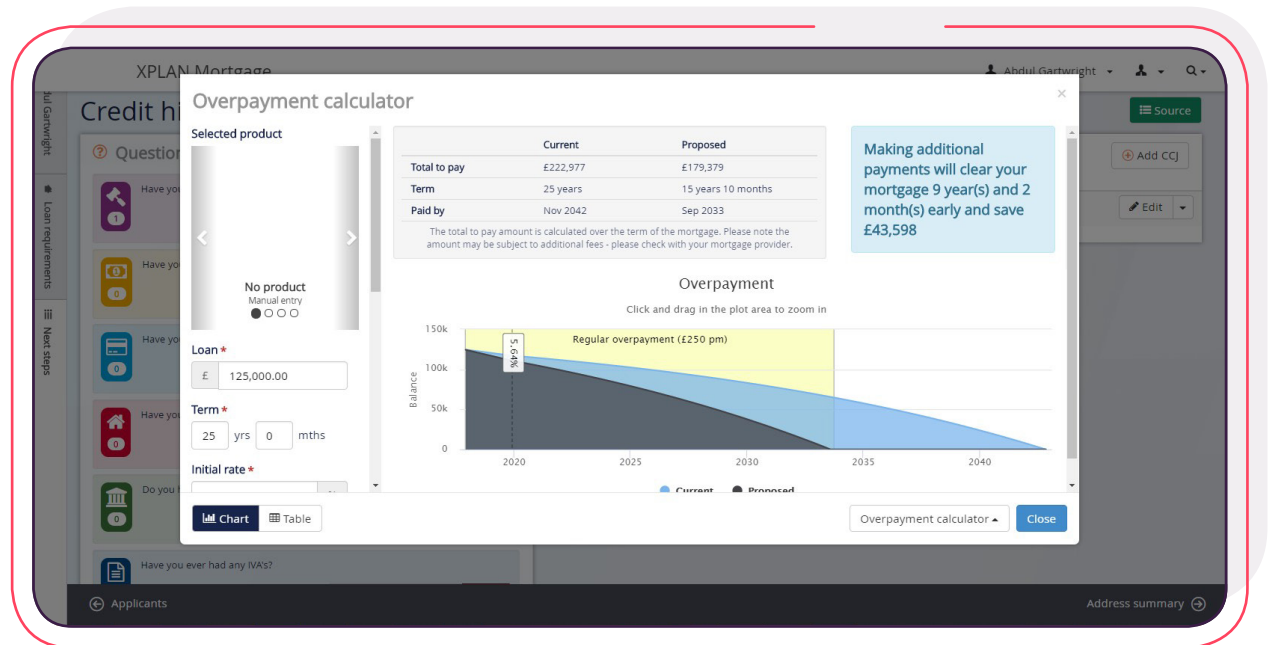


Xplan Mortgage keeps on getting better and better.”

## Proactive Insurance & Mortgage Services



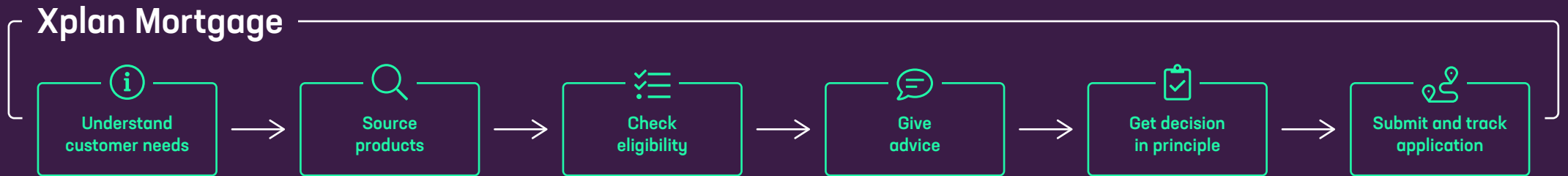
Eligibility checking allows you to quickly and easily discover if your clients are eligible for a mortgage and the likelihood of application acceptance.



The overpayment calculator shows how much clients can save by paying off their mortgage early.



# Can you draw a picture for me?



# Can you break it down for me?



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## Mortgage Sourcing

- Full mortgage sourcing available including residential, second charge, enhanced buy-to-let and secured loans.
- Instant online access to the latest lender data, as available in Trigold, without waiting for system updates.
- Compare mortgages side-by-side against secured loans.
- Our eligibility service, to determine if clients are eligible for a mortgage and if they will be accepted, is powered by HD decisions (part of Experian). This service speeds up the application process by checking eligibility prior to application and includes a bureau check, an affordability check based on lenders criteria and a review of the client's credit record. In addition, you can check eligibility with multiple lenders without the need to re-key data.
- Online calculators can be used to graphically demonstrate the impact of overpayments, term and rate changes to your clients.

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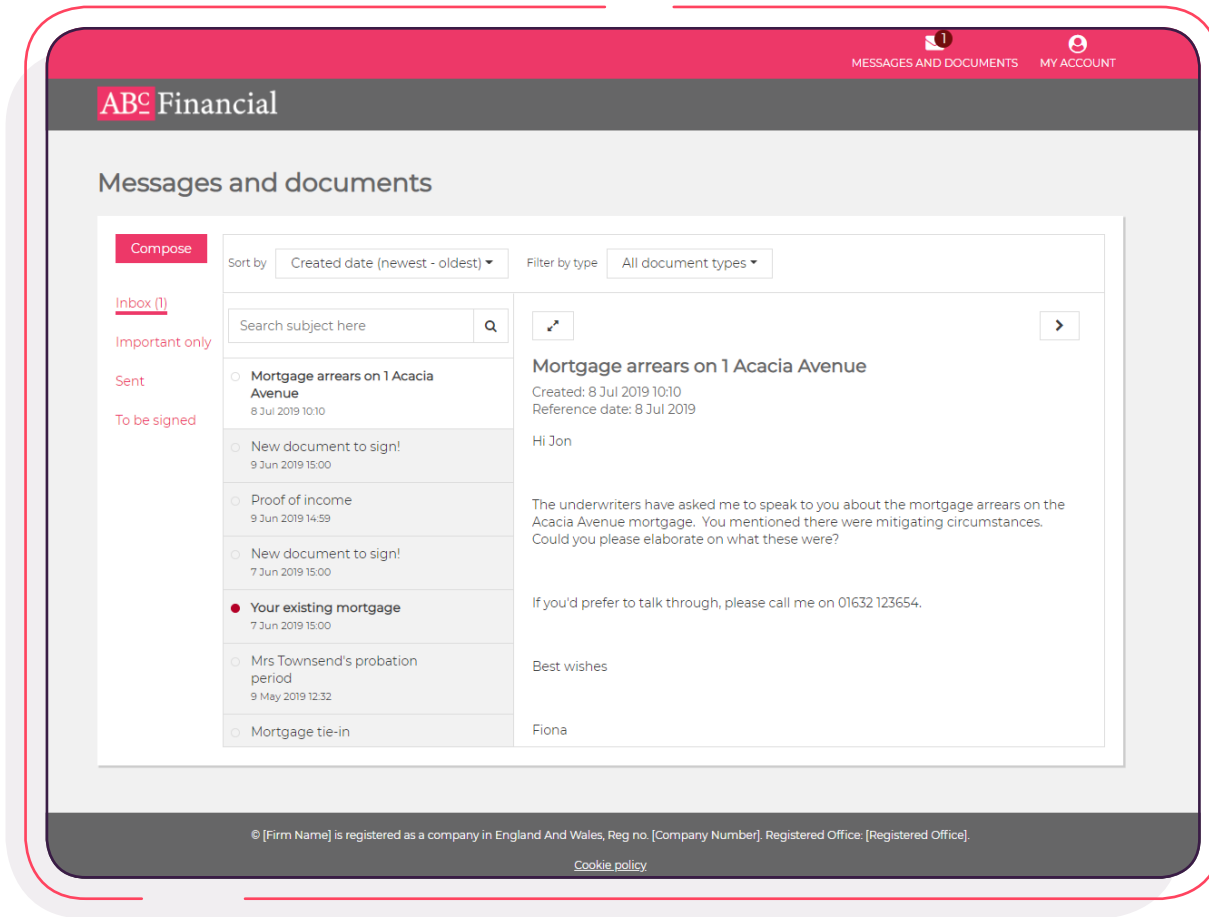
## Protection Sourcing

- Accurate, whole-of-market sourcing with access to the widest range of products and providers in the market.
- Protection is sourced as part of the mortgage journey with no re-keying of data or switching systems required.
- Client needs are identified early in the mortgage advice journey to assist in closing any protection gaps.
- Fully integrated protection sourcing with application data sent directly to providers.
- Quote and compare up to five benefits at once, from both single- and multi-benefit policies.

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## Advice Module

- Supports lender application connectivity by transferring full fact find data directly from Xplan Mortgage to lender portals.
- All client cases, tasks and appointments are accessible from a single intuitive dashboard.
- Leads automatically appear on the dashboard as a task to action.
- Automatically pulls through client details against diary appointments.
- Captures documentation and notes around product recommendations and pre-populates mortgage suitability and protection demands and needs letters.



Engage with your clients at a time and place that suits them, with a secure branded portal.

## Client Relationship Management (CRM)

- A range of management reports and dashboards to monitor business performance.
- Configurable mortgage suitability and protection demands and needs letters.
- Track client information in client notes.
- Search capability to identify clients for potential cross-selling opportunities.
- Execute marketing campaigns and track their effectiveness.
- All changes made to client data and complaint tracking can be viewed via a dedicated register.
- Customisable tasks and workflows.

## Client Portal

- Your own branded portal including corporate colours.
- Two-way secure communication with your clients from any device at any time.
- Documents and messages can be shared and actioned in real time.
- Easy file sharing allows clients to upload documents to verify their identity and income.
- Clients can sign documents digitally.
- A central and secure portal hosted by Iress.

# Give me five reasons why I should use it

1

## Powerful

Accurate whole of market sourcing for mortgage and protection.

2

## Reassurance

Trusted and accurate, uses the same data as Trigold and The Exchange.

3

## Multi-device

Multi-user capability with 24/7 online access from any device or browser.

4

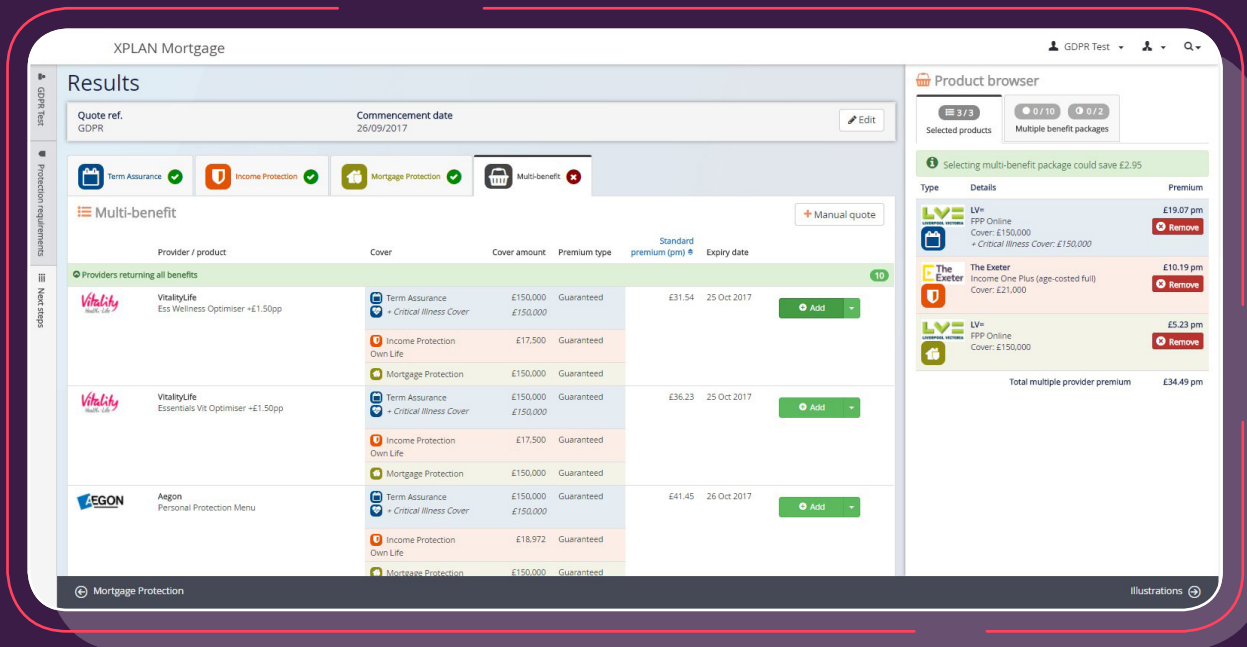
## Cost effective

Low-cost monthly subscription, plus training and support.

5

## Secure

Hosting, back-up and upgrades all managed by Iress.



Protection can be sourced as part of the mortgage journey without switching between systems—no need for re-keying.

## 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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