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Iress launches the Iress Partnership; elevating integration to true collaboration

Iress today announces the launch of the Iress Partnership, a strategic initiative to enhance its UK Wealth business through tightly aligned, high-impact integrations with select third-party technology providers.

While Iress already supports over 100 fintech and regtech integrations through its open API program, Iress Open, the new Partnership marks a step-change in approach. Rather than just enabling interoperability, the Iress Partnership is about building solutions together - from initial concept through to delivery. This new approach encourages innovation and client flexibility while retaining Xplan's reputation for stability and leadership.

Iress' Managing Director of UK Wealth, Alex Hore, said: "Most integration programs stop at connectivity. The Iress Partnership goes much further. We co-design the solution with our partners, aligning roadmaps, training teams to talk about one joined-up experience, not two separate products. The result is a deeper, more seamless experience for advisers and their clients."

Unlike the standard model, where two firms build independently and then bolt their products together, the Iress Partnership focuses on joint solution design, shared technical resources, and aligned development priorities. It replaces the traditional 'all-in-one' model with a curated ecosystem, offering clients the best of both worlds: the flexibility of choice and the polish of unified design.

"The Iress Partnership is where we go deep," added Hore. "This is where we say: these are the firms we've chosen to align with, to invest in and to shape the future of the platform alongside. At the same time, our existing integration model, Iress Open, still allows customers the flexibility to integrate elsewhere if they have a different chosen solution."

The first firm to join the Iress Partnership is PlannerPal, an AI-powered platform purpose-built for modern financial advice and wealth management workflows. Seamlessly connected via enhanced access to Xplan APIs, PlannerPal enables adviser firms to automate meeting documentation, surface client insights, validate and update CRM records, and generate structured, compliant reports.

PlannerPal co-founder and CEO, Mark Whitcroft, said: "We are delighted to be the first to join the Iress Partnership. This collaboration unlocks broader access to Xplan's APIs, enabling a deeper, more intelligent integration of PlannerPal's award-winning AI-powered platform –



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ultimately delivering richer insights, streamlined workflows, and measurable outcomes for advisers, firms, and clients.”

Hore commented: “PlannerPal is a great fit for the Iress Partnership, having already established a strong reputation in the industry in a relatively short period of time. This partnership is the first of many that will support and strengthen Iress’s leadership in financial advice technology in the UK Wealth market.”

Each Iress Partnership firm undergoes rigorous due diligence, ensuring alignment not just in terms of security and compliance, but also in culture, product philosophy, and long-term commitment. In return, these partners benefit from co-marketing opportunities and event participation, access to APIs and data sets, and direct collaboration with Iress's product and engineering teams.

For advisers, this means fewer fragmented solutions and more cohesive, reliable workflows. For clients, it means a smoother experience, delivered by partners who are not just technically connected, but strategically aligned.

Iress expects to onboard a maximum of four partners per year through the highly selective program - prioritising quality, longevity, and complementarity.

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