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Iress and Moneyinfo announce strategic partnership to transform the adviser-client experience

Iress today announced client portal leader Moneyinfo as the second entrant to its exclusive Iress Partnership program. Connected via enhanced access to Xplan APIs, the Iress Partnership program commits to align roadmaps, co-design solutions and push the boundaries to deliver advanced, strategically aligned propositions. This landmark collaboration delivers an advanced integration between Xplan and Moneyinfo that redefines the digital experience for financial advisers and their clients.

The first phase of the launch with Moneyinfo, live today, includes tightly integrated digital fact-finding, driving streamlined client onboarding and a richer two-way flow of information and documents. Full digital fact-finding capabilities, including custom field mapping, will follow later this year.

The two businesses have worked closely together and with adviser firms to design and test a market-leading integrated practice management and client portal solution, bringing together the scale and flexibility of Iress' Xplan with Moneyinfo's intuitive, white-labelled client portal, which is used by hundreds of wealth management firms across the UK. Likewise, Xplan is the adviser software of choice for over 450 UK firms, and Iress is the trusted technology partner to five of the top eight UK wealth management firms.

The move for deeper integration follows the recently launched Iress Partnership program, a sector-leading blueprint for working with best-in-class tech providers to deliver tightly aligned, high-impact integrations for a deeper, more seamless experience for advisers and their clients. Marking a new era of open architecture and industry cooperation, the partnership with Moneyinfo is illustrative of this vision. This expanded integration builds on the existing connection between Xplan and Moneyinfo, unlocking deeper two-way data sharing and a level of process automation and efficiency that can't be achieved from a basic connection or a standard back-office portal.

Iress' Managing Director for UK Wealth, Alex Hore, said: "This partnership is a direct response to the growing demand for deeper, powerful integrations that deliver real-world benefits and reflects our commitment to giving clients more choice in how they provide high-quality digital experiences. We've known and respected the Moneyinfo team for many years for their expertise in digital client engagement, and collaborating on such a deep integration has been fantastic. By combining the power of Xplan with Moneyinfo's market-leading digital interface, we're enabling firms to deliver faster, more connected, and engaging client journeys - creating bespoke digital experiences that provide a real competitive edge."

The partnership between Xplan and Moneyinfo delivers a more connected, efficient, and client-centric experience that unlocks strategic business growth. By seamlessly integrating client engagement with core adviser workflows, the solution significantly reduces administrative effort and enhances productivity, freeing advisers to focus on building stronger relationships, providing superior advice, and confidently growing client numbers without increasing administrative workload.

Other benefits include enhanced data accuracy to reduce manual input errors, strengthened reporting and compliance, and improved reliability for decision-making. The integration also improves the user experience, creating a seamless onboarding journey that reduces friction and boosts satisfaction for both advisers and clients.

Moneyinfo's Managing Director, Tessa Lee, added: "We're passionate about pushing the boundaries of technology to benefit the wealth management industry. Partnering with a firm trusted by so many advice firms in the UK means the benefits of this enhanced integration with Xplan will be felt by a great many advisers and their clients. This collaboration tackles key friction points in the advice process and gives firms the tools to deliver a better-connected client experience. It is a great example of the real-life benefits deep integration can deliver."

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About Iress

Iress (IRE.ASX) is a technology company providing software to the financial services industry. We provide software and services for trading & market data, financial advice, investment management, life & pensions and data intelligence in Asia-Pacific, North America, Africa, the UK and Europe.

www.iress.com

About Moneyinfo

Moneyinfo is the UK's leading Digital Relationship Management (DRM) platform for the wealth management community. Supporting over 190 firms, Moneyinfo helps streamline engagement, compliance, and communication through a secure, fully brandable client app that integrates with the industry's most widely used CRM and back-office systems.

www.moneyinfo.com