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Iress Xplan to underpin Mattioli Woods' transformation

Iress has today announced it has been selected by Mattioli Woods Plc as its service and technology partner to support future growth. Iress' advice software Xplan will be deployed across the whole of Mattioli Woods wealth management business, including employee benefits. A phased implementation is well underway, with nine offices having migrated onto Xplan since June this year with the final office to complete in 2024.

Mattioli Woods is an AIM-listed wealth management company with over 11,000 clients, 900 employees and £15 billion in assets under management, administration and advice.

As part of the group's long-term strategy, Mattioli Woods was seeking a robust and scalable technology solution able to support its current business needs and future growth aspirations. Iress was chosen over a number of potential providers, following a thorough evaluation and assessment.

Iress's Managing Director, UK Wealth, Alex Hore, said, "We're delighted to extend and deepen our longstanding relationship with Mattioli Woods. Like many of our clients, they are growing organically and through acquisition. Adopting a core operating platform across the business will accelerate their business goals, drive greater efficiency and most importantly help them deliver excellent client service.

"Iress is investing in both our implementation and migration capabilities to ensure we can meet demand from new clients, while delivering with speed and quality. We are committed to the UK and look forward to delivering enhanced solutions to Mattioli Woods and all our clients here."

Mattioli Woods's Group Deputy CEO, Michael Wright, said, "Mattioli Woods is known for achieving great outcomes for its clients. As we've grown, we've developed real centres of excellence within our business. Using Xplan as our core client servicing hub, we will have the scale and operating efficiency to be able to extend all our services to all our clients, where suitable, helping them achieve their financial goals and delivering ongoing improvements in their user experience.

"We have been impressed by Iress's capabilities, and particularly by their ongoing commitment to continuous improvement. Their overriding goal matches ours, which is to provide constantly evolving and robust solutions that our clients can trust."

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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, mortgages, superannuation, life & pensions and data intelligence.

Our software is used by more than 10,000 businesses and 500,000 users globally. We have over 2,250 people based in Asia-Pacific, North America, Africa, the UK and Europe.

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