More gains
less pain

Private Wealth software
built for better performance

iress.com/privatewealth

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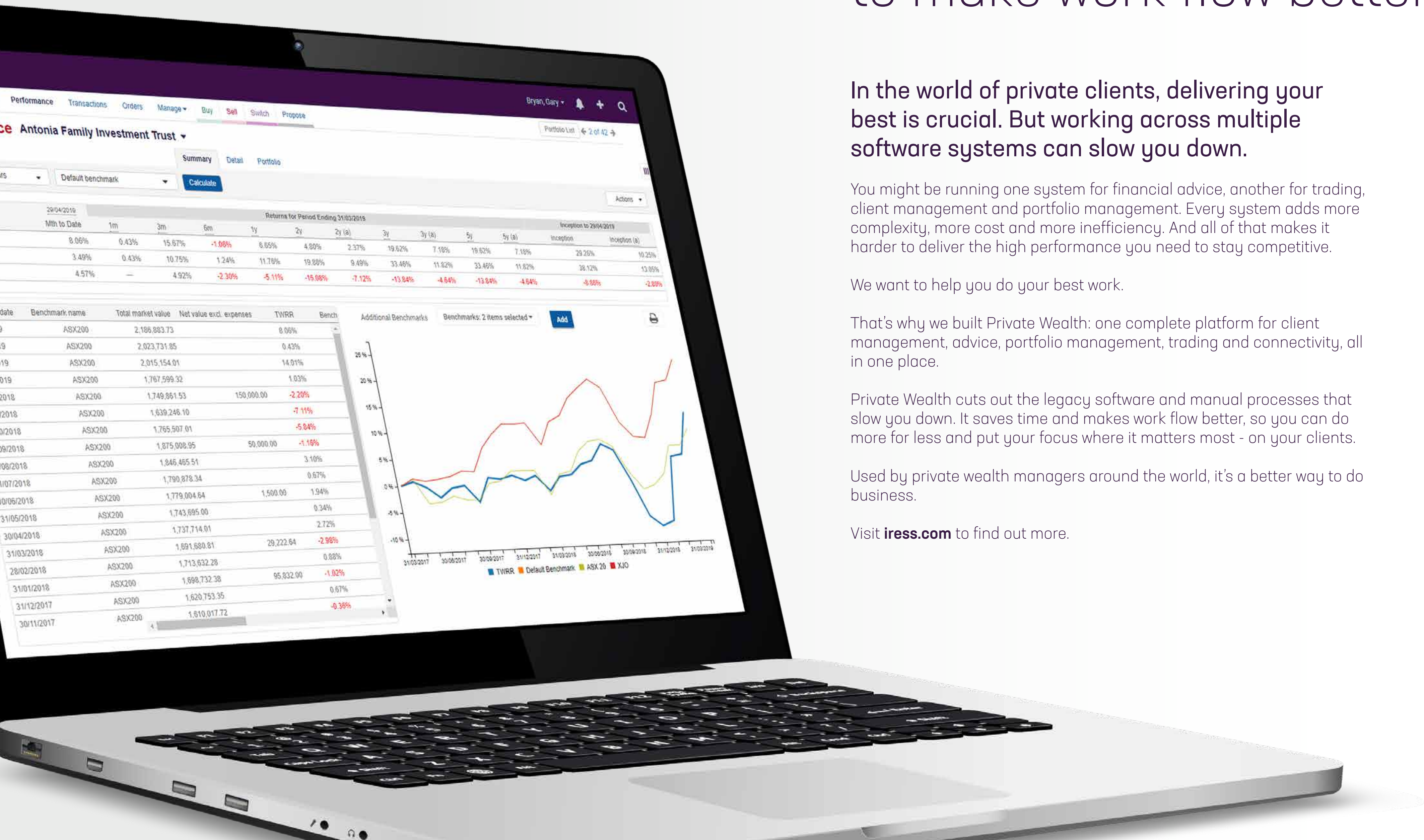


One joined-up system to make work flow better

In the world of private clients, delivering your best is crucial. But working across multiple software systems can slow you down.

You might be running one system for financial advice, another for trading, client management and portfolio management. Every system adds more complexity, more cost and more inefficiency. And all of that makes it harder to deliver the high performance you need to stay competitive.

We want to help you do your best work.

That's why we built Private Wealth: one complete platform for client management, advice, portfolio management, trading and connectivity, all in one place.

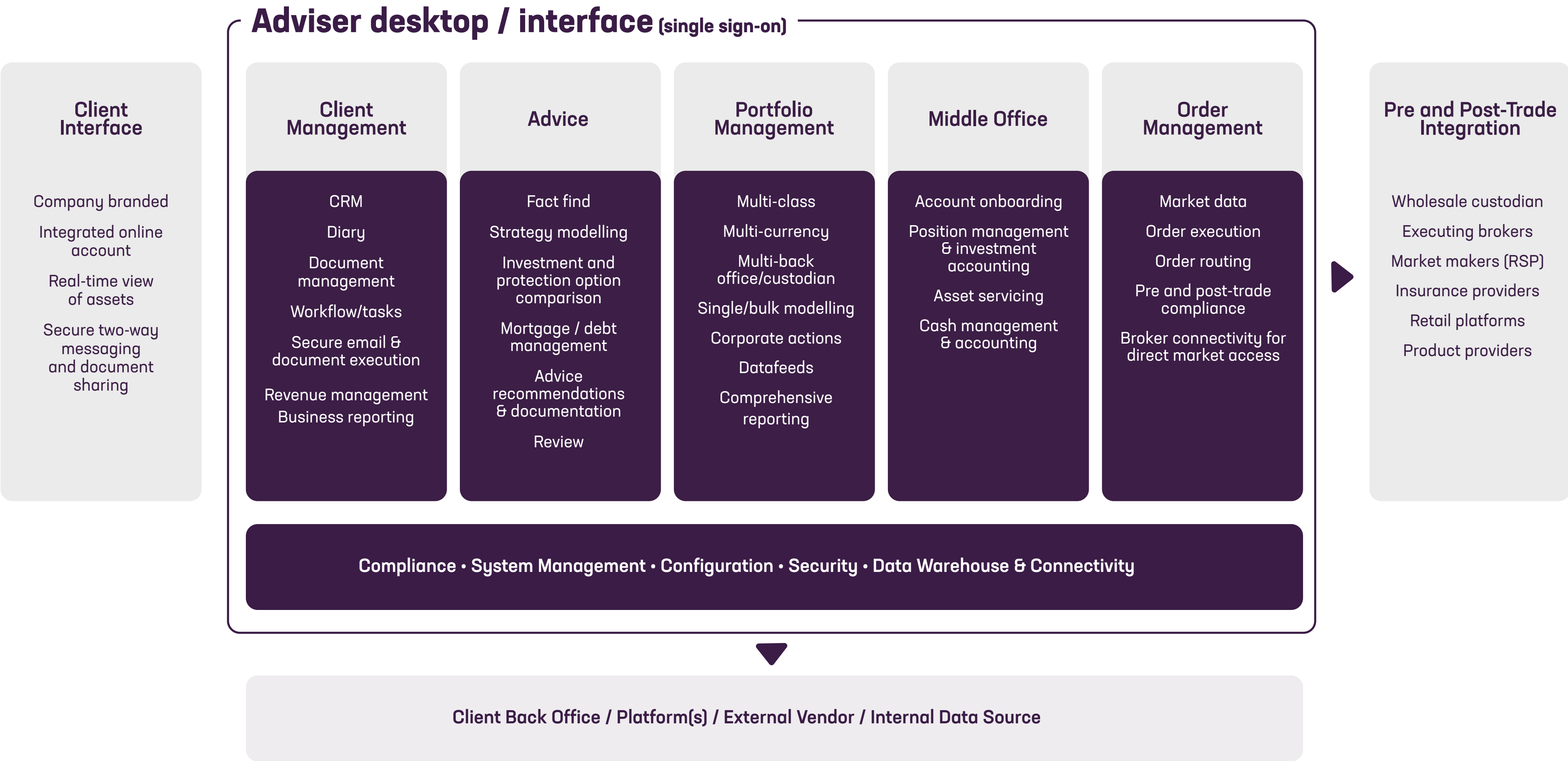
Private Wealth cuts out the legacy software and manual processes that slow you down. It saves time and makes work flow better, so you can do more for less and put your focus where it matters most - on your clients.

Used by private wealth managers around the world, it's a better way to do business.

Visit **iress.com** to find out more.

How it works

From client management to financial advice, portfolio management, trading and execution, Private Wealth gives you everything you need, all in one place. Cloud-based, fully hosted and managed by Iress, it's a completely connected system to help you work smarter, maximise opportunities and deliver more for your clients.



Having everything in a single ecosystem through the Iress platform means that our advisers are able to make more informed and timely decisions for their clients—saving time and reducing risk across the breadth of services we provide.”

Justin Greiner, CEO, JB Were

Stay organised with **one CRM and client file**

Keep all client information, documents, records, workflows and advice tools in one place. See all of your client's assets and get a complete view of your client's financial position.

Work **your way**

Start with a step-by-step transition from your legacy systems, customise your user screens and reporting, and configure the risk tools, audit trails and alerts you need.

Maximise every decision

Take advantage of portfolio management tools, fast order entry and execution, direct market access, datafeeds, management reporting and dashboards.

Demonstrate the value of your advice

Build stronger connections with a full suite of client-facing functionality, a client portal, digital signatures and integrations with Zoom, Microsoft Outlook and more.

Reduce risk

Minimise the systems you need to get the job done, take advantage of robust compliance checks, reduce rekeying and cut the risks that come with siloed data.

Stay supported

Benefit from a continuous development cycle built around regulatory standards, security and functionality and supported by a global team of 2250+ people.

Financial services software built for better performance.

Around the world, thousands of private wealth managers, financial advisers, investment and asset managers, traders, lenders and brokers choose our software to help run smarter businesses, aim higher and achieve more.

We started in Australia in 1993. Today we're a growing team of 2250+ people across APAC, Europe, Africa and North America, building the software and infrastructure to help the financial service industry perform at its best.

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Find out more at iress.com