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Providend partners with Iress to deliver next-gen adviser and client platform

Financial technology provider, Iress, has today announced that wealth advisory firm, Providend, has selected its Xplan advice software to support the delivery of digital, scalable advice for its advisers and clients. Providend is the first fee-only wealth advisory firm in Singapore, who acts as a trusted adviser to their clients.

The partnership aims to support Providend's strategic vision of empowering its advisers to provide holistic wealth advisory services and integrated portfolio management via a centralised digital portal that will provide a streamlined client experience.

Iress' managing director for Asia, Jason Hoang, said: "We are delighted to partner with Providend to support their purpose of providing their clients with honest, independent and competent advice in simpler and easier ways.

"Providend will adopt Iress' flagship Xplan and client portal to digitise the workflow, from client onboarding to advisory and execution. At the same time, Providend's clients will be able to access their investment portfolios anytime and anywhere on a range of devices through Iress technology."

Providend's chief executive officer, Christopher Tan, said: "Providend believes that our clients' interest stays at the heart of our service. We are pleased to partner with Iress, which combines international experience and local knowledge to provide us with a best-in-class digital experience and a personalised service delivery model that best serves our clients.

"The partnership endeavours to support Providend's goal to achieve greater operational efficiency while ensuring timely monitoring and advice is delivered to our clients."

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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 9,000 businesses and 500,000 users globally. We have over 2,000 people based in Asia-Pacific, North America, Africa, the UK and Europe.

www.iress.com

About Providend

Providend is a mid-sized ensemble, professional practice firm that focuses on doing the right thing. As an independent wealth adviser and fund management company licensed by MAS, we offer various wealth solutions to assist you in wealth planning.

Over the years, we have come to be known as a specialist in retirement planning—accumulating towards retirement and especially drawing-down in retirement using our proprietary tool, RetireWell. Many of our clients have private banking relationships but engage us as their trusted adviser for valuable second opinion.

<https://providend.com/>