

**Your members.
Your advice.
Delivered online.**

Robo Advice
iress.com/robo-advice



Tell me how it will help me

Member engagement in superannuation can often be low or non-existent. In addition, an increasing number of consumers—across generations—are choosing to research and make financial decisions online. Iress recognises these challenges and has devised a contemporary, intuitive and engaging member experience.

Robo Advice allows you to service members seeking digital superannuation advice. With your own branding, this built-for-scale technology allows you to diversify your service offerings, extend your value proposition and directly engage with your members easily and effectively.

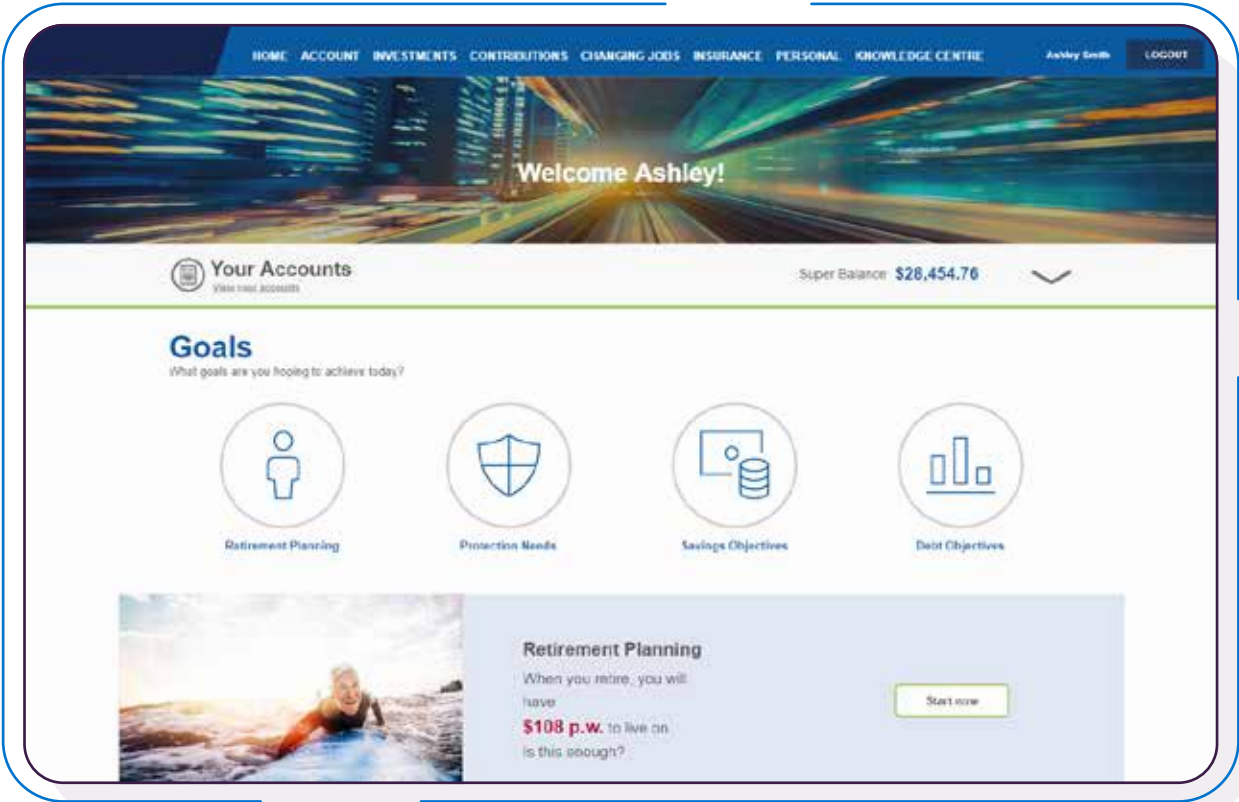
Tell me what it actually does

Robo Advice provides your members with a self-service advice offering, accessible from any device 24/7. It allows you to digitally engage with members via online advice journeys targeting specific goals. This helps to improve a member's financial situation and support their changing investment, lifestyle and financial goals.

Robo Advice enables members to execute strategies so they can achieve better outcomes. It covers a range of financial objective advice journeys such as retirement adequacy, insurance needs or savings goals and includes educational content to help members understand, and navigate, their financial well being.



Member-led navigation to a better retirement outcome, anytime, anywhere.



Allow members to articulate their goals and plan towards achieving them.

Can you break it down for me?

Embed within your fund's member portal

Easily incorporate with your existing member portal, drawing on already known member data to provide a head start on the advice journey.

Targeted goals-based solution

Calls to action—utilising known member data—can be highlighted to show members if they need to take specific actions to ensure their goals are met.

Financial calculators & interactive advice tools

The advice members receive—driven by Xplan's powerful calculators—provides the same consistent and accurate calculations that your financial advice team would offer.

Triage & seamlessly transition into other advice channels

All captured data is stored in Xplan allowing advisers to 'pick up' the member's journey and provide either guided or comprehensive advice.

Obtain data analytics for targeted marketing to members

Valuable analytics show you how members are both accessing and using the solution. With this information you can devise new advice opportunities and enhance member engagement.

Fully hosted & supported by Iress

Minimises the ongoing technical and costly overheads of managing your own custom site.

Key functionality

Through APIs, the open architecture integrates with any superannuation registry platforms, websites and portals.

Robo Advice is available with native integration between Iress' Acurity and Acurity Online software, as well as Xplan and Xplan Prime financial advice software; providing you with an end-to-end solution for super administration and member services.

All member data is managed in one place, reducing the risks associated with re-keying data between systems creating operational efficiencies.



Give me three reasons why I should use it

1

Enhance member engagement

Through the delivery of online resources members are guided to a better financial pathway.

2

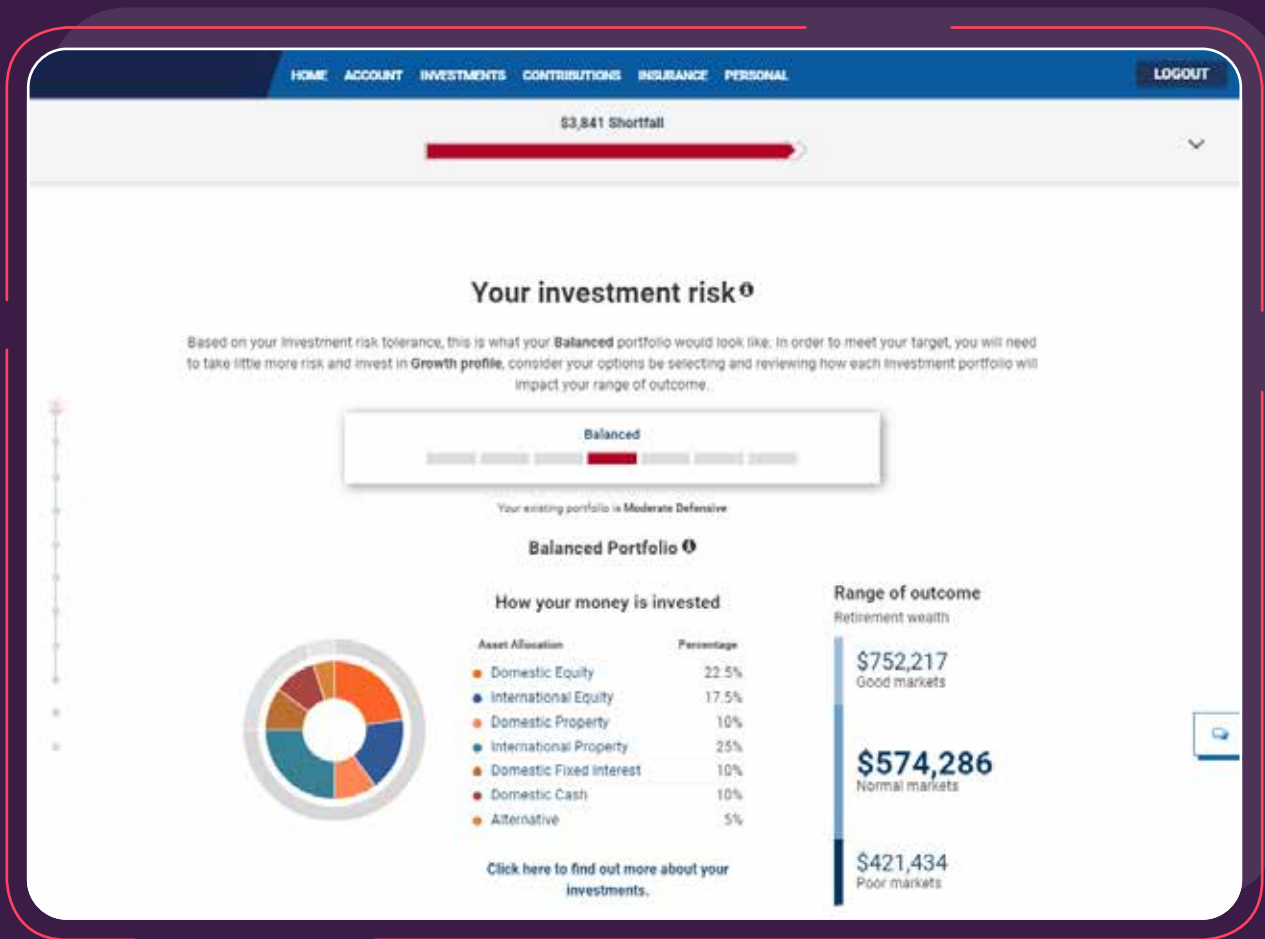
Educate and enable

Members can self-serve their basic superannuation strategies and transactions.

3

Gain awareness

Understand more about engaged members, and help facilitate the delivery of further member services and advice through an integrated triage process.



Risk profiling, understanding risk and matching to a preferred super portfolio option.

What about service and support?

We understand providing great service and support goes hand-in-hand with delivering great software.

We pride ourselves on our thorough and timely implementations, reliable and scalable hosting services, robust back-up and recovery procedures, and ISO/IEC certified information security management.

Our expert-led support team, training programs and online user community all help our users get the most out of our software.

How does Iress stack up as a technology partner?

Every day, more than 9,000 financial services businesses use our software to make better decisions and deliver better results. We know they don't just expect software that works, they also want a technology partner that works with them.

Leveraging our industry knowledge and global experience working with clients just like you, we design, develop and deliver creative, reliable software that does what you need it to.

At Iress, we believe technology should help people perform better every day.



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