



iress.com/xplan-mortgage

Get moving Xplan Mortgage

Trigold vs Xplan Mortgage



Upgrade from Trigold and get your business moving.



Trigold vs Xplan Mortgage

Top features	Trigold	Mortgage & Advice	Mortgage, Advice & Protection	Mortgage, Advice, Protection & CRM
Same product and sourcing data	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Multi tab source results to compare products	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Richer prepopulation of client data into lender's portals via Lender Connect for faster applications		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Suitability reports		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cloud-based with automatic daily updates, so you always have the latest info		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Use on any device or browser (pcs, macs and mobile) to access client info anywhere - perfect for remote working or closing deals on the go		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Full Knowledge Bank integration, search criteria and filter product sourcing * subject to KB subscription		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Eligibility checks seamlessly integrate		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Comprehensive mortgage modelling calculators & total cost view		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Branded client portal, to securely communicate with clients, and fact find online without long meetings		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Manage mortgage and protection end-to-end without switching platforms or rekeying information			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Automated protection quote and apply (powered by The Exchange) to offer a fully protected mortgage cost			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Xports - the ability to run MI reports for your business				<input checked="" type="checkbox"/>
Advanced searches and management for lead generation				<input checked="" type="checkbox"/>
Compliance alerts and ability to amend suitability letters				<input checked="" type="checkbox"/>

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