Xplan Mortgage

The complete mortgage and
protection software platform.

Introduction

Researching, recommending and applying for the right mortgage and protection products can be complex and time-consuming, particularly when advisers must move between multiple systems.

Xplan Mortgage brings the entire process together into one easy-to-use, cloud-based platform. It helps advisers work more efficiently, collaborate more effectively and deliver better outcomes for clients, all from a single connected system.

What is it and what does it do?

Xplan Mortgage is a **digital, end-to-end mortgage and protection sourcing platform** that allows advisers to:

Fact find	**Source products**	**Obtain a decision in principle**
Research lending criteria	**Give advice**	**Submit and track applications**

All from one connected system with **instant connectivity to lenders and other software portals.**

It uses the **same whole-of-market data as Trigold and The Exchange,** guaranteeing access to the most suitable products for each client - without switching systems or re-keying data.

Features and benefits

Mortgage Sourcing

Faster, more confident product selection with real-time market accuracy.

- Residential, second charge, enhanced buy-to-let and secured loans
- Live lender data (same as Trigold)
- Side-by-side mortgage vs secured-loan comparisons
- Built-in calculators to model overpayments, term and rate changes

Knowledge Bank

Saves time and improves advice suitability for complex cases.

- Over 100,000 pieces of criteria
- Coverage across 200+ lenders
- Rapid access to non-traditional lending solutions

Lender Connect (API Connectivity)

Faster, smoother application processing with reduced re-keying.

- Direct API connection to lender portals
- Pre-populated client details from Xplan Mortgages

Protection Sourcing

Seamless mortgage-to-protection advice with no system switching.

- Whole-of-market protection sourcing
- Protection sourced within the mortgage journey
- Fully integrated protection applications
- Quote and compare up to five benefits from single and multibenefit policies

Advice & Case Management

Centralises advice workflow and improves operational efficiency.

- Transfers full fact-find data directly to lender portals
- Single dashboard for cases, tasks and appointments
- Automatic lead allocation
- Auto-population of mortgage suitability and protection demand & needs letters
- Document and note capture for recommendations

Client Relationship Management (CRM)

Strengthens business oversight, client relationships and revenue opportunities.

- Management dashboards and performance reporting
- Configurable suitability and protection letters
- Client notes and complaint tracking
- Advanced client search for crosssell opportunities
- Marketing campaign execution and tracking
- Customisable tasks and workflows

Ready to experience Xplan Mortgage?

Book a demo at iress.com/xplan-mortgage or by calling us on 03450 530 490.

Or contact your Iress Account Manager to get started.