

IRESS to launch new digital advice offering

IRESS will release a next generation online advice offering for XPLAN clients from early 2018 to enable financial advisers to further engage with clients during the advice process.

The digital advice offering will allow advice practices to offer their clients access to several aspects of the advice process online, including viewing key documents, digital investing and cash-flow management.

IRESS' product executive for wealth management, Emily Chen, said IRESS' objective was to continue to help advisers improve the quality of the advice experience as well as helping advice businesses improve their efficiency.

"Advisers are increasingly telling us that their clients are seeking easier, greater interaction and transparency within the advice process. Our new offering will build on existing online client functionality to meet evolving needs and allow advice businesses to determine the level of self-service by their clients.

"We want to help advisers put the right tools in their clients' hands to help achieve this. Within the new offering, clients will be able to access and perform a range of activities within the online advice offering including viewing correspondence with their financial advisers, accessing personalised news feeds, booking advice appointments, having visibility of their own spending and share trading.

"The advice offering is being co-designed with advisers and their clients. The offering will also be configured for individual advice groups and institutions based on particular compliance regimes and existing advice workflow."

Media enquiries

Coran Lill

Telephone: +61 (0)468 963 068

coran.lill@iress.com.au

About IRESS

IRESS is a leading supplier of technology solutions to clients in the financial markets, wealth **management**, and mortgage sectors. IRESS is listed on the Australian Securities Exchange (IRE.ASX) with operations in Australia, New Zealand, the United Kingdom, South Africa, Canada, and Asia.