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Iress adds AI advice assistant PlannerPal to the list of Xplan integrations

Iress today announces a new integration with AI-driven PlannerPal, adding to the list of Xplan integrations available for financial advice clients. The addition is part of Iress' continued drive to help their advice clients achieve greater efficiency, reduce costs and take charge of Consumer Duty obligations.

PlannerPal uses AI technology to generate meeting transcripts, actionable summaries and written follow-ups. Integrating PlannerPal with Xplan will make it easier for advice firms to track client interactions, quickly recall client information, and automatically generate client emails and documentation in the adviser's unique style and format.

Iress' Managing Director, UK Wealth, Alex Hore, said, "The team at PlannerPal share our view that technology should help advice firms work smarter and more efficiently. We know advisers spend too much time on administration and low-value tasks, and AI technology can change this.

"Adding PlannerPal to our list of Xplan integrations helps our advice clients do more of the work that matters, like delivering great, personalised advice and service while taking advantage of the benefits of technology. It also supports our strategy to be a better integrator and business partner."

PlannerPal CEO and Co-Founder Mark Whitcroft said, "While AI technology has advanced rapidly, it's crucial to have the right tools tailored to your specific role and need. PlannerPal empowers advisers and their teams to harness AI without disrupting established workflows. We are thrilled to collaborate with Iress to help advisers realise the immediate value of AI in daily advisory tasks. Our customers have already seen a doubling in the capacity of client interactions, showcasing the efficiency gains achievable with PlannerPal."

The PlannerPal integration is the fifth to go live in 2024 and adds to Xplan's wide range of existing integrations and data feeds.

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For further details, please contact:

Andrew Dunn

Streets Consulting

Mobile: +44 (0)7917 696 506

andrew.dunn@streetsconsulting.com

About Iress

Iress (IRE.ASX) is a technology company providing software to the financial services industry.

We provide software and services for trading and market data, financial advice, investment management, mortgages, superannuation, life and pensions, and data intelligence.

Our software is used by more than 10,000 businesses and 500,000 users globally. We have over 1,900 people based in Asia-Pacific, North America, Africa, the UK and Europe.

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