

Media Release **UNDER EMBARGO UNTIL 13:00 on 28 January 2025**

## Iress announces “game-changing” live two-way integration with CIExpert

Iress today announced it has teamed up with CIExpert to launch a two-way, real-time integration bringing price and quality research together in one place. The functionality, which is exclusive to Iress, is available on Iress’ sourcing platforms, The Exchange and Xplan Mortgage. It can also be added to an advice firm’s own CRM upon request.

CIExpert is trusted by advisers to simplify the process of comparing critical illness policies on both cost and quality. The live two-way integration builds on a previous one-way integration from CIExpert into The Exchange, which has already helped advisers and brokers save time while making the best possible decisions for their clients when it comes to critical illness cover.

Iress’ Head of Business Development for Sourcing, Warren O’Connell, explains: “Iress and CIExpert are both leaders in our respective fields of sourcing and product quality research. This new collaboration delivers a depth of integration that is the first of its kind in the market and has been described by broker firm LifeSearch as “game-changing”.

“We wanted to go beyond everything else that we’d done previously or that already existed. To be able to deliver on that in just a little over 12 months is a great example of two research platforms not only listening to their customers but acting on what they say.

“We know how vital the comparison process is in ensuring recommendations match the client’s individual requirements. We also know it’s important to speed up both the recommendation and associated compliance processes to help advisers and brokers spend more time on value-added tasks rather than admin. Thanks to great collaborative working and a shared vision, CIExpert and Iress have made this a reality, paving the way for even more innovation in this space.”

Alan Lakey, founder of CIExpert, added: “The FCA’s Consumer Duty has increased the pressure on advisers to demonstrate they are recommending “fair value”. However, poor integration between systems has long been a major frustration for advisers, making this task unnecessarily complex and time-consuming. This collaboration builds on years of Iress’ expertise in integrating not only their own platforms but also a wide range of disparate CRM systems. By doing so, this innovative solution creates a seamless connection between systems, enabling advisers to evaluate client options more efficiently while ensuring that compliance support is centralised in one place. This represents a significant milestone for both advisers and their clients.”

### Notes to editor

At a glance:

- This integration is first-of-its-kind with real-time, two-way, deep integration of price and quality research, which pulls data into one place in The Exchange, Xplan Mortgage or the user’s own CRM.
- It follows a number of enhancements made by Iress in 2024, including the introduction of ex-smoker questions, which allows more accurate premiums to be returned up front.

- 'Beyond price' initiatives are meeting clear adviser demand for price certainty, with 94% of advisers stating they would choose 'factors-led' over 'price-led' searches.<sup>1</sup>

Feedback from the market:

"What began as feedback from our team in a strategy session has become a game-changing reality. This leap forward will vastly simplify the adviser role, offering customers a well-rounded view of their protection advice and empowering them to make better-informed decisions and even better outcomes for customers. Thank you for making it happen. Truly outstanding work by everyone involved." **LifeSearch**

"By saving valuable time and enhancing the adviser experience, this powerful combination is already proving its value in helping us deliver top-tier service for our customers." **L&C**

"Making it easier for advisers to have those quality-led conversations is pivotal for moving the needle forward." **The Protection Coach**

## Ends

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## About Iress

Iress (IRE.ASX) is a technology company providing software to the financial services industry. We provide software and services for trading & market data, financial advice, investment management, superannuation, life & pensions and data intelligence in Asia-Pacific, North America, Africa, the UK and Europe.

[www.iress.com](http://www.iress.com)

## About CIExpert

With a heritage spanning twelve years, CIExpert is the market-leading critical illness cover (CIC) comparison tool that creates in-depth analysis to enable advisers to understand and assess the best choice for their clients and arms them with the tools to convey the rationale to their clients. Being an independent company, it is objective and free of prejudice or favouritism.

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<sup>1</sup> Iress internal user preference research, November 2024.