

**Features, fees &
performance.
Compare with
confidence.**

Xplan WealthSolver

iress.com/wealthsolver



Tell me how it will help me

Comparing key criteria and consolidating data before delivering it to your clients is a time-consuming task. Rollover or consolidation of your client's retirement and savings is also a key component of the advice process.

Xplan WealthSolver incorporates data on over 890 superannuation, pension and investment products and presents the data in a concise and easy to read format. This takes the hassle out of comparing key criteria, leaving you with more time to spend on your client's needs.

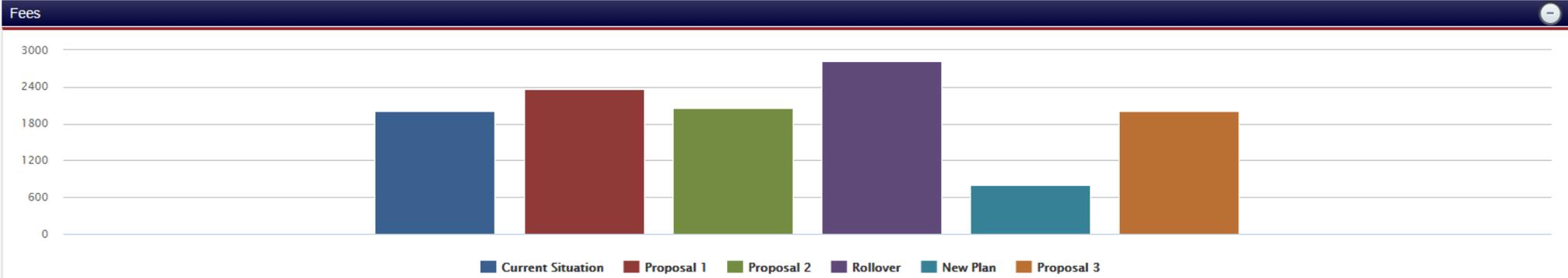
Tell me what it actually does

Xplan WealthSolver provides advisers with an efficient and compliant process to deliver retirement and investment planning advice through the use of comprehensive comparison tools.



Show me what it looks like

Proposals						
Client Plans	Current Situation	Proposal 1 Switch Investments Switch Investments	Proposal 2 Plan Review	Rollover Rollover/Consolidate Plans ⚠️	New Plan New Plan	Proposal 3 Rollover/Consolidate Plans
<input checked="" type="checkbox"/> Advance Pooled Superannuation Trust	\$130,000.00	\$130,000.00				\$130,000.00
<input checked="" type="checkbox"/> Agentia Super Service	\$65,000.00	\$64,997.15	\$194,998.10			\$65,000.00
<input checked="" type="checkbox"/> Local Government Super Accumulation Scheme					\$59,919.00	
<input checked="" type="checkbox"/> Zurich Superannuation Plan (Entry Fee)				\$194,278.50		
<input checked="" type="checkbox"/> Other holdings	\$60,000.00		\$60,000.00	\$60,000.00	\$0.00	\$60,000.00



On-going costs	Current Situation		Proposal 1		Proposal 2		Rollover		New Plan		Proposal 3	
Administration Fees <input type="text"/>	\$240.50		\$240.50		\$721.50		\$1,709.65		\$162.00		\$240.50	
Expense Recovery Fee <input type="text"/>	\$60.00		\$60.00		\$60.00		\$0.00		\$0.00		\$60.00	
Investment Fees and Costs <input type="text"/>	0.5986%	\$1,526.50	0.9644%	\$1,880.50	0.394%	\$1,004.25	0.4392%	\$1,116.90	0.6901%	\$413.50	0.5986%	\$1,526.50
Membership Fee <input type="text"/>	\$144.00		\$144.00		\$144.00		\$0.00		\$71.24		\$144.00	

Graphical fee comparison of multiple proposed strategies against client's current situation.



Can you break it down for me?

WealthSolver is underpinned by a comprehensive product database providing a plentitude of information including:

- Fees relating to each administration platform.
- An investment menu available under a platform with the associated costs and asset allocations.
- Quantitative benefits and features available within each platform.
- Group insurance coverage.

This information is collated into a number of different formats so you can:

- Compare fees.
- Compare intangible features and benefits.
- Compare the cost and features of insurance cover within superannuation.
- Consolidate amounts in multiple funds to compare fee impact.
- Use projection analysis.
- Incorporate retirement strategies into an efficient Statement of Advice (SoA) document.

There is no fee for product providers to have their products included within WealthSolver. The research data is typically derived from the latest Product Disclosure Statement (PDS) and investment guide/menu documents obtained directly from the product providers.

All underlying investment option data (such as performance, asset allocations and ICRs) are sourced from FundData (an Iress subsidiary company).



Ensure fund selections match client risk profiles with a seamless switch investment process.



Give me four reasons why I should use it

1

Comprehensive

Incorporates data on over 800 superannuation (retail/government/corporate/industry funds/SMSF/wraps) and pension plans.

2

In-depth information

Sources quantitative investment funds information from FundData—a specialised, independent fund data collection and supply business.

3

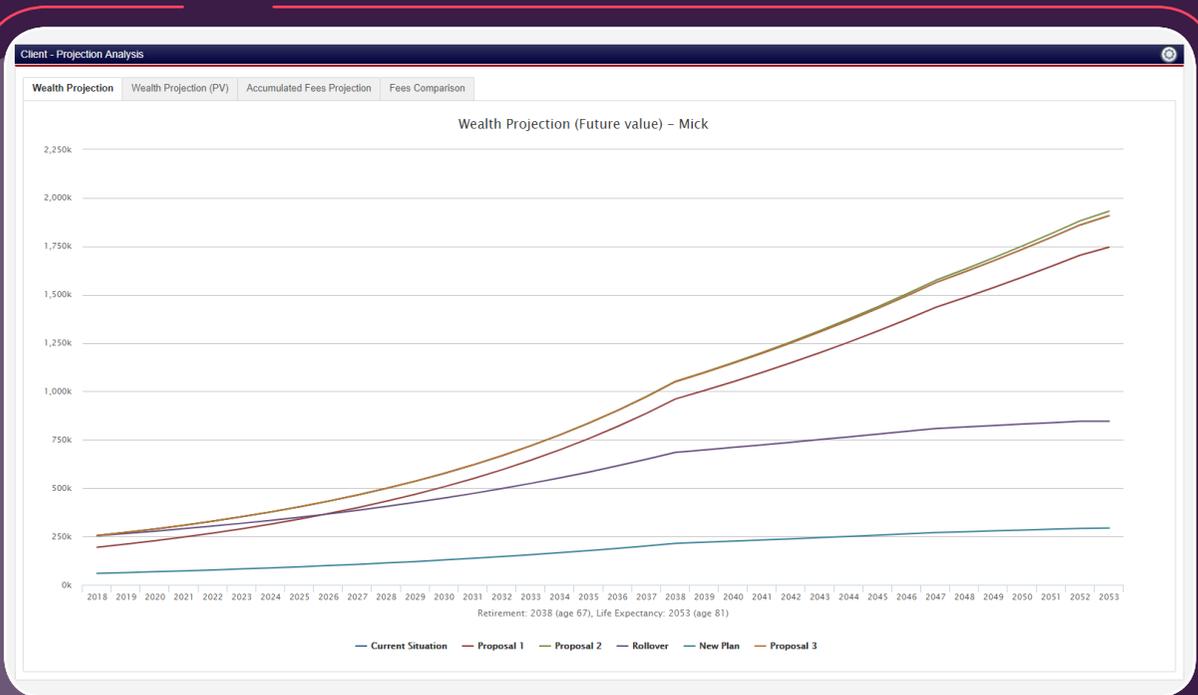
Accredited

Provides data prepared under ISO9001 accredited processes.

4

Easy integration

Integrates with Iress Portfolio System (IPS).



Review the long-term impact of your proposed strategies.

What about service and support?

We understand providing great service and support goes hand-in-hand with delivering great software.

We pride ourselves on our thorough and timely implementations, reliable and scalable hosting services, robust back-up and recovery procedures, and ISO/IEC certified information security management.

Our expert-led support team, training programs and online user community all help our users get the most out of our software.

How does Iress stack up as a technology partner?

Every day, more than 9,000 financial services businesses use our software to make better decisions and deliver better results. We know they don't just expect software that works, they also want a technology partner that works with them.

Leveraging our industry knowledge and global experience working with clients just like you, we design, develop and deliver creative, reliable software that does what you need it to.

At Iress, we believe technology should help people perform better every day.



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