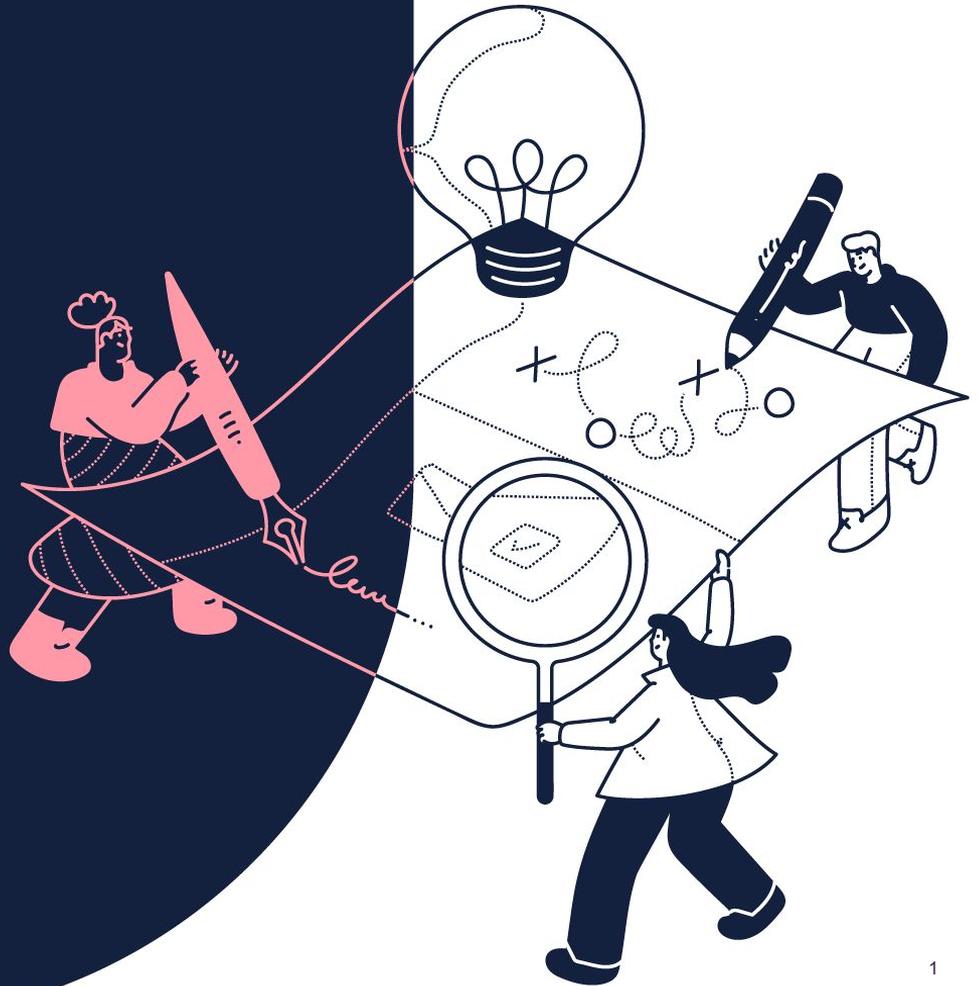




Wealth APAC 2024 delivery roadmap

October | 2024



Solving the **\$2.1bn advice capacity conundrum**



The Big Shift research revealed a potential \$2.1bn in new revenue and **nearly half a million new advice clients by 2030** for advice businesses that can adapt to meet this demand.

But there is a capacity conundrum. Many advice firms will need to take steps to free up sufficient capacity. **Could your advice business take on 30 new clients today?**

Top Advisely Index members save over 280 hours a year in advice delivery alone - almost a day a week. We want to support more advice businesses do the same.

Produce a strategy paper

6hrs

4hrs

Alisdair Barr
Founder & CEO, Striver

Clients per Adviser (Individual)

Your result

Average

Top 10

0 100 200 300

Growth Masterclass

Watch industry experts transform a practice for growth

Learn the secrets to scaling up to meet the growing demand for advice

Selin Ertaç
Director and Principal Consultant, Tangelo Advice Consultancy

Director, Practice Dynamics

Boost Your Advice Efficiency

Your Advisely Index benchmark result

Your Result 31

Industry Average 57

Fraser Jack

How we're tracking to roadmap delivery



73%

27%

Delivered to plan

Delayed

(16 Q3 initiatives)

(6 Q3 initiatives)

Change in scope

Re-prioritisation

Third party dependencies

1 initiative was extended to address incremental client feedback identified during discovery.

2 initiatives were re-prioritised due to a critical technology update and the extension of another initiative, which pushed timelines out.

2 initiatives were delayed due to third parties taking slightly longer than quoted on our timeline, including legal dealings.

Five **pillars** for advice tech product development



The 2024 roadmap is built around critical pillars that guide our significant investment in Xplan's capabilities, and is underpinned by a commitment to **continuous uplift**, incorporating **your feedback** and value-add **integrations**. It contains both our deliverables for 2024 and the key longer term initiatives currently underway.

Supporting improved adviser efficiency

Automation and streamlined workflows that enable you to focus more on your clients.

Leading the way in compliance & security

Proactively safeguarding your business, clients and advisers.

Boosting precision in client portfolios and tooling

Increasing the comprehensiveness of our modelling, portfolio & research capabilities.

Transforming adviser and client experience

Delivering better navigation for advisers and a more engaging client experience.

Powerful business intelligence and insight

Making it easier for you to understand how your business is running so you can operate more optimally.

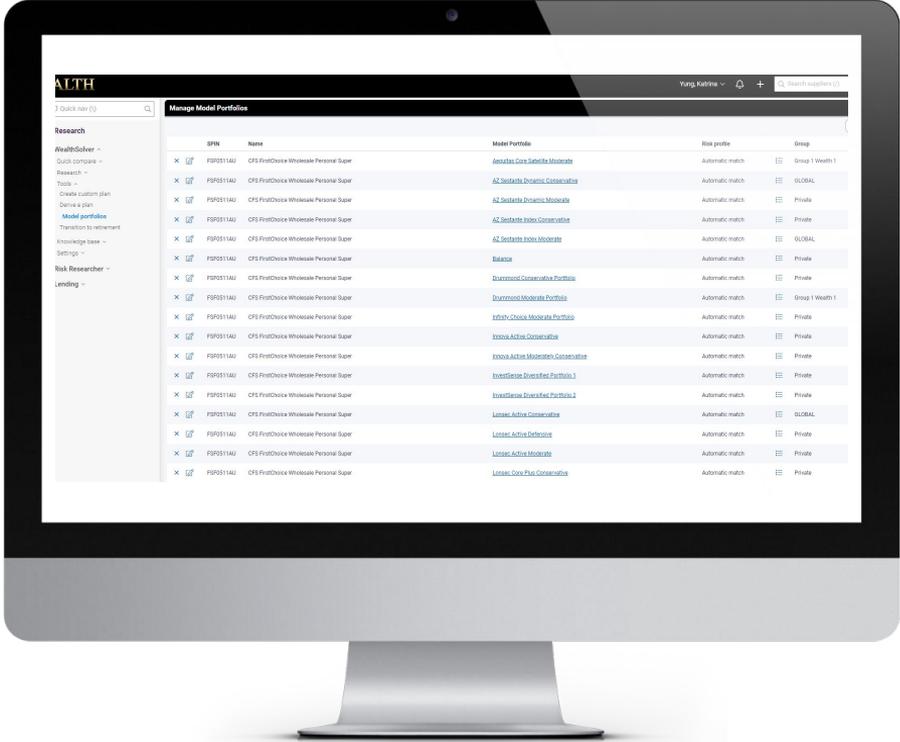
2024 Wealth APAC product initiatives

Here's what we're doing.



Reduce manual data entry via integration with CFS model portfolio

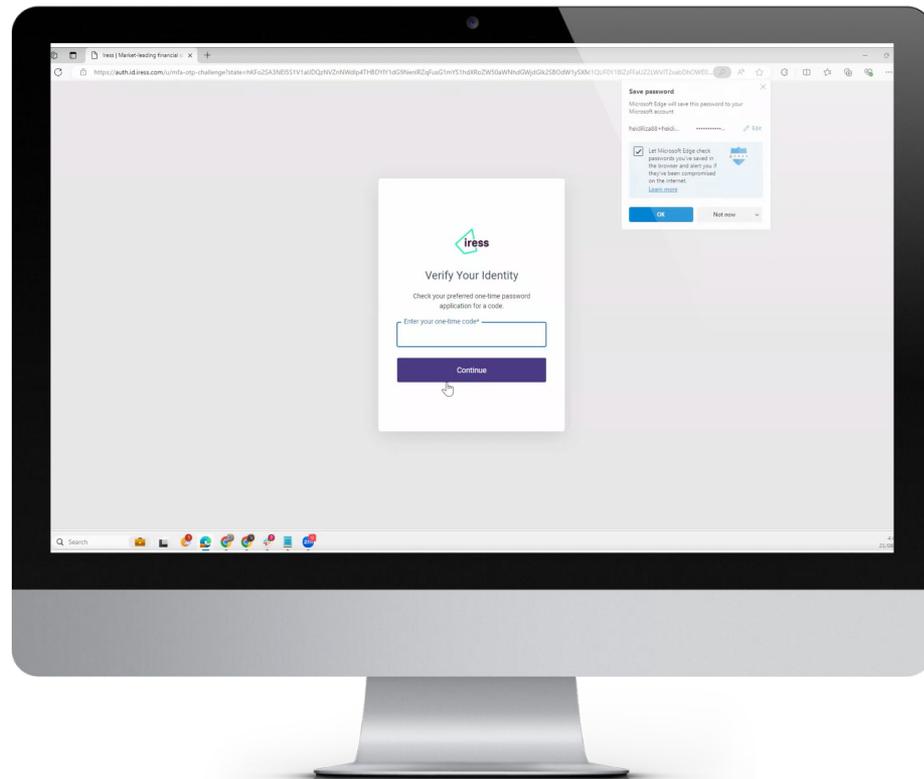
This seamless integration enables you to reduce manual work and directly manage specialised portfolios within the WealthSolver model portfolio environment, ultimately empowering you to make more informed investment decisions, with ease.



One seamless login via IressID

Introducing IressID - best in class privacy and security, working to keep your business and client data safe.

You will be able to use one seamless login method to access all your Iress software, with aligned user authentication across Xplan, Iress Community, Advisely and API connectivity.



🔊 Response to client feedback ✅ Delivered as planned ➡ Delay to plan 🟡 New to plan

▼ Indicates when you will see a outcome delivered

DELIVERED in Q3

COMMITTED FOR DELIVERY
Q4/24 Q1/25

PROPOSED

IressNet

Simplified authentication

Information security

Implement Adviser Registration Security & automated data refreshes for seven Fund Manager Datafeeds (Citi) ➡

Implement Adviser Registration Security & automated data refreshes (Netwealth) ▼

Expand Iress ID to Iress Connect (Customer Support portal)

Align user authentication across Xplan, Iress Community, Advisely and API connectivity to **one seamless login method**. Rollout across client groups to follow. ➡

Provide modern authentication (OAuth2) for BYO **email SMTP**

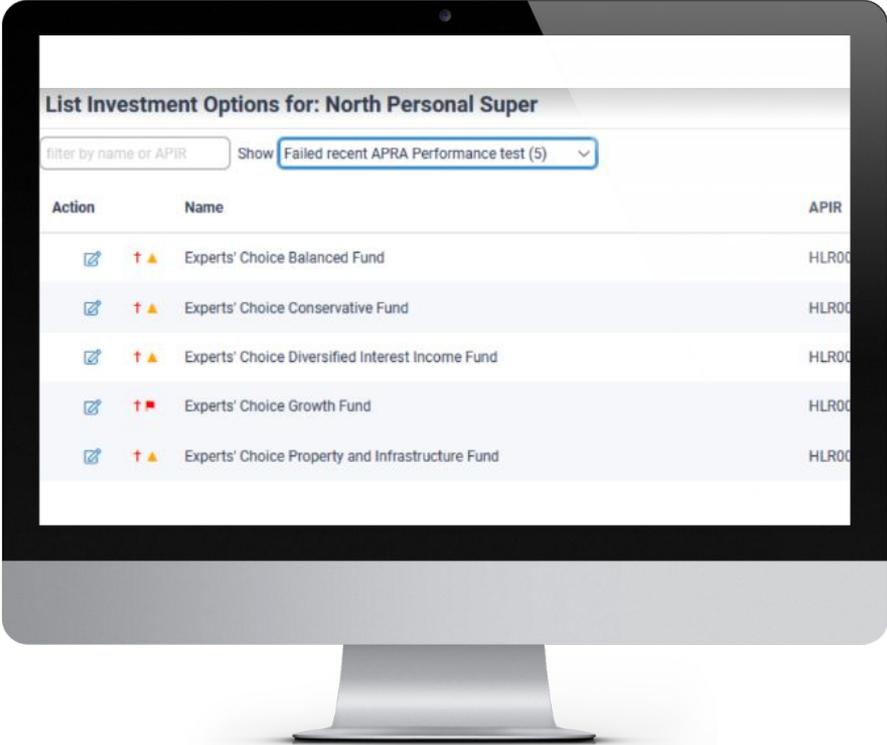
Strengthening access and security protocols through migration of all user accounts to Enterprise Managed User accounts and partitioning of Wealth GitHub user account ➡

SOC2 Type 2 uplift completed (off the back of Type 1 recommendations) ✅

SOC2 Type 2 Compliance report delivered (Simplify ongoing due diligence by ensuring we maintain operational controls) ➡

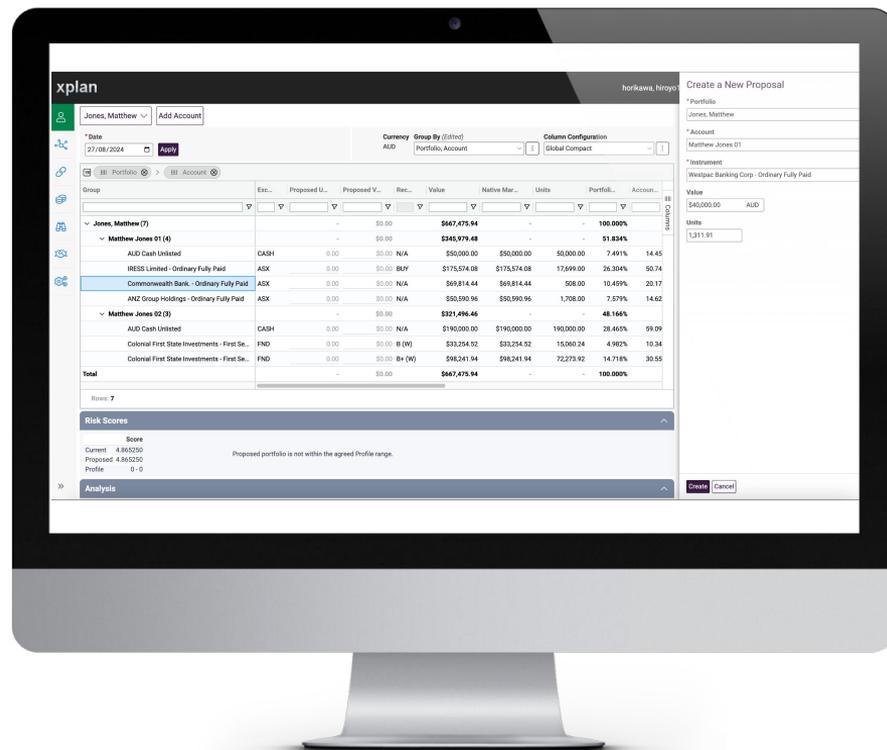
Get full visibility with Underperforming Fund flag

Advisers will be able to see a flag on options associated with a plan or plans that they are modelling that indicates the option has failed the annual APRA performance test, allowing you to deliver better advice outcomes to your customers.



Portfolio Recommendation screen uplift for better navigation and customisation

We're rolling out a number of new features, such as easier customisation and data entry to save you time with a more streamlined and efficient Recommendation screen in Xplan Portfolio.



Xplan Business Intelligence is coming

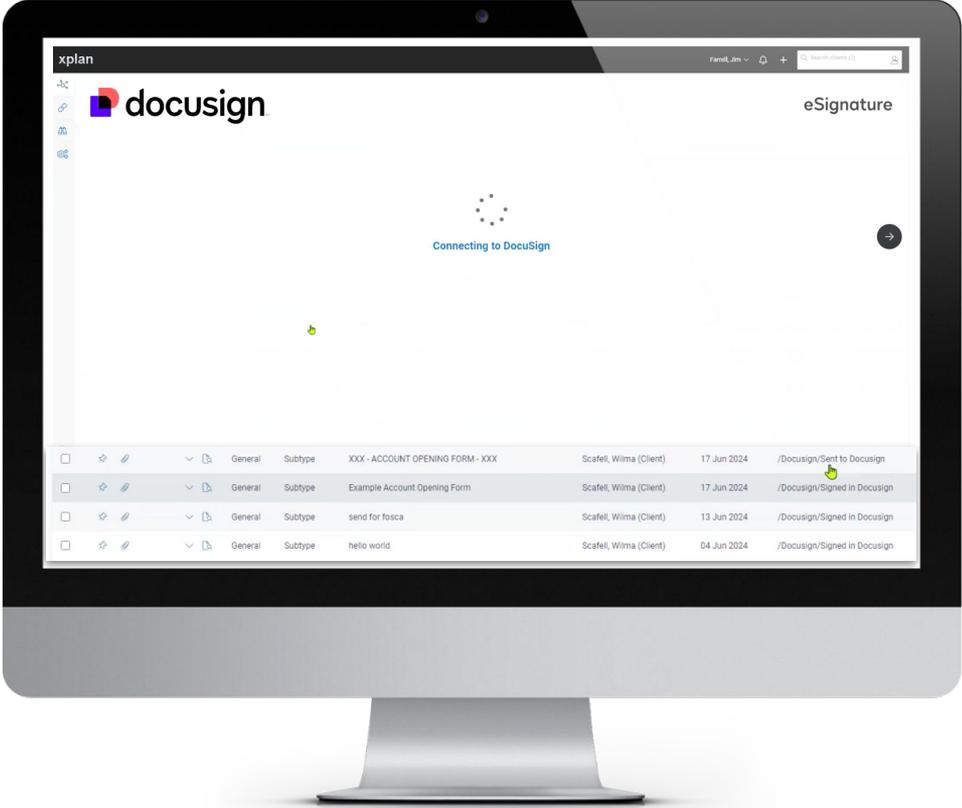
We're working on a self-service data analytics and business intelligence (BI) platform designed to integrate directly within the Xplan user interface, to give you better insights about your business.

It's still in discovery - but if you're interested in testing this new product, get in touch with us!



Our integration with Docusign is coming to Australia & NZ this quarter, with more to come

We'll work with you to assess a range of industry-recognised digital signing applications that best fit your need.



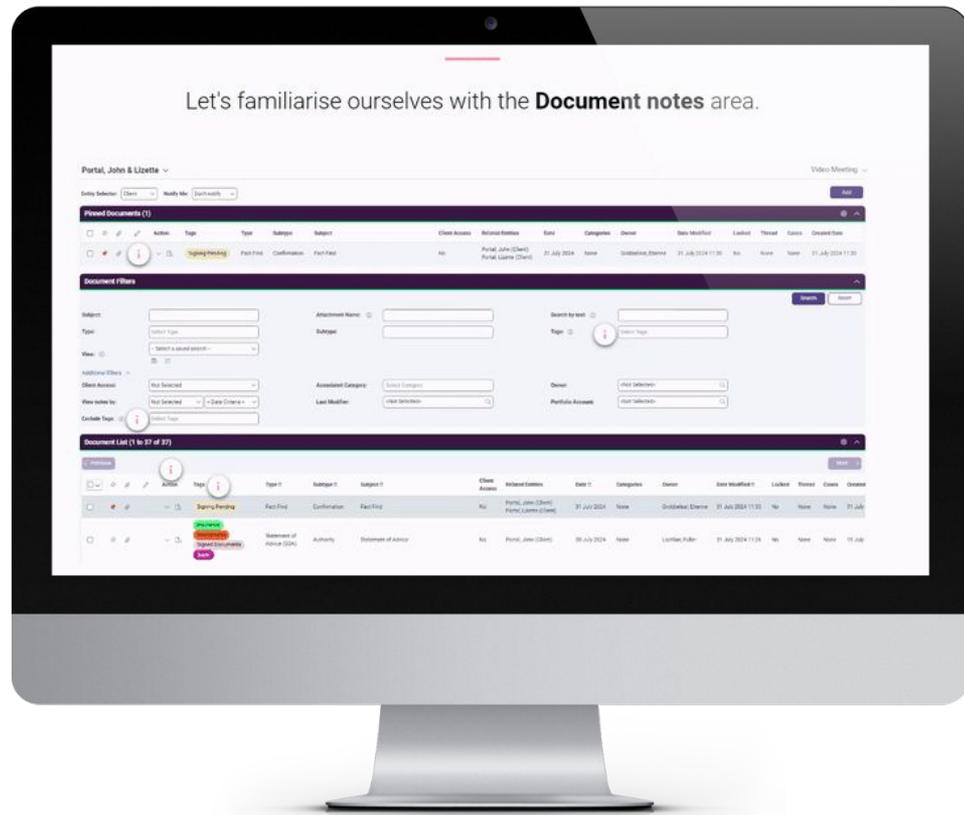
We're launching quarterly learning plans to align with our roadmap!

Get a better understanding of new features via a series of webinars, e-learning, micro-learns, and virtual classrooms.



Scan the QR code or visit the link below to access your learning plan now!

<https://learningcentre.iress.com/login/index.php>



Q&A



We want your feedback!

Scan the QR code to complete our pulse survey (no more than 60 seconds!) and share your thoughts on the roadmap.

