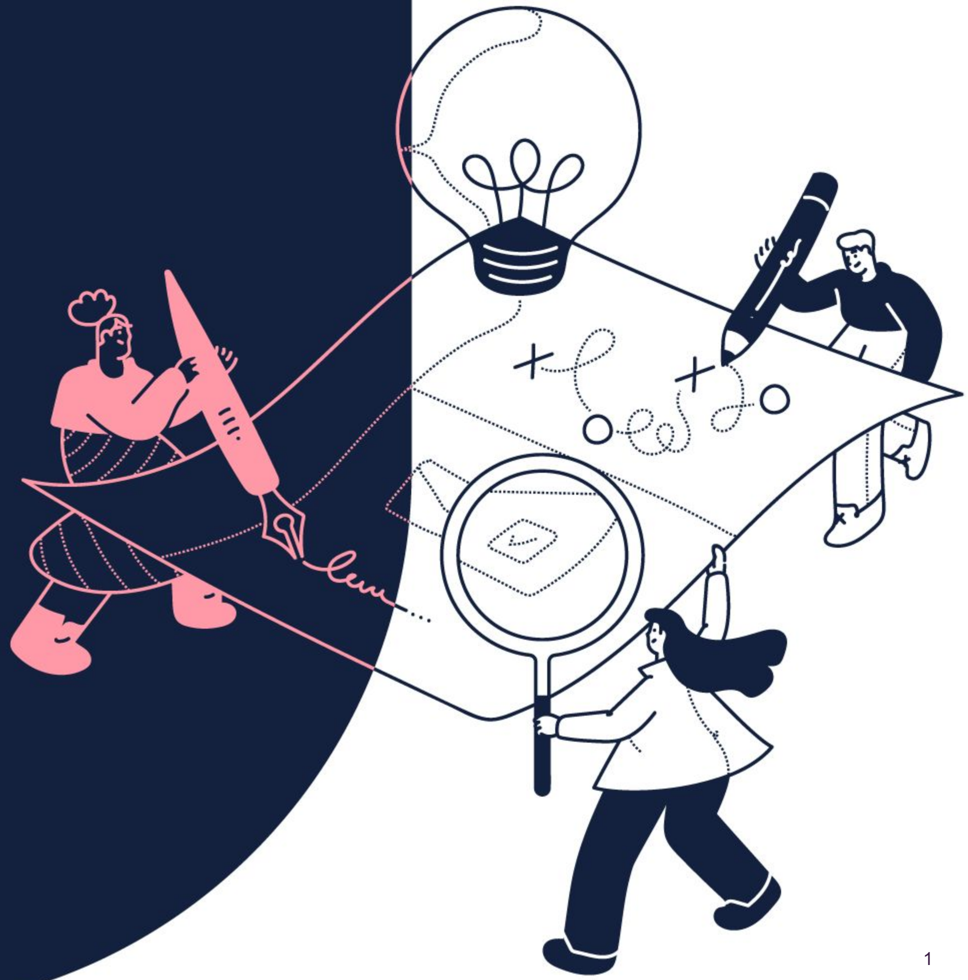
Xplan

2025 Wrap Up



November 2025

Hosts

Kerry Ong, General Manager - Customer

Yulia Tjhin, General Manager - Xplan

We acknowledge the Traditional Owners of this land, the Gadigal people of the Eora Nation.

We recognise their continuing connection to land, waters and culture. We pay our respects to their Elders, past and present.

Artwork by Merindah Funnell.

Housekeeping

CPD accreditation
0.5 of CPD credits will be available once the multiple choice questionnaire is completed.

Feedback and questions
Please fill in the feedback form
The link will be displayed in a QR code at the end of the webinar.

Advice is changing intergenerationally

Gen Z face very different financial futures to Boomers

1 in 2 Gen Zs still live with parents - by necessity mostly. 59% of them seek full financial freedom.

Intergenerational transfer means a wide range of needs.

Boomers prefer in person or phone interactions. Gen X are phone or email & Gen Y - Z prefer digital.

End of life has changed, and life plans are different.

People are living longer and retiring differently and later. They are also engaging in living legacies.

Source: Mark McCrindle: Demographics, Advice and the Changing Face of Advice

Support efficiency soars | faster resolutions, greater responsiveness

14,287

resolved support requests YTD

7 days

av. resolution time from 51.5 days

74%

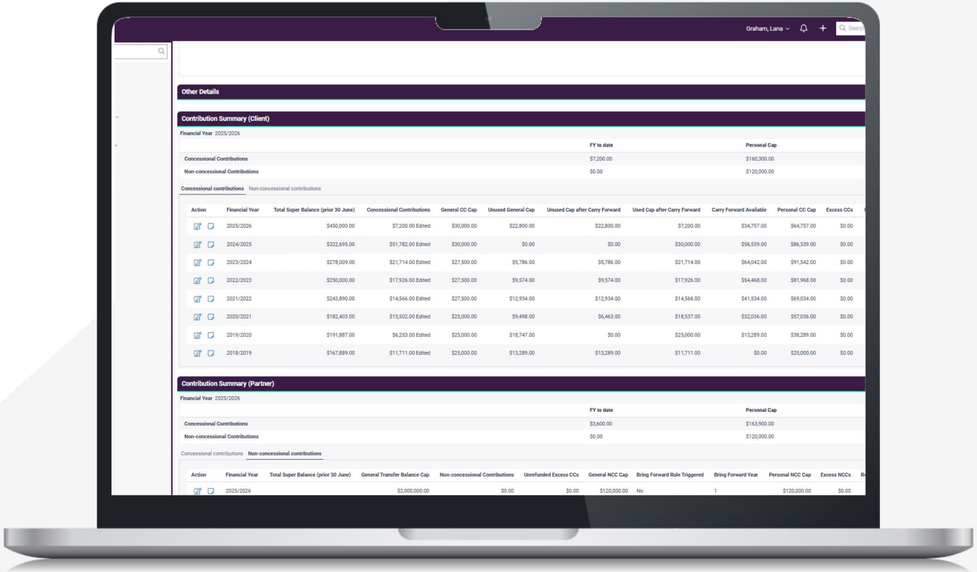
faster resolution time

Data from the reporting period May-July vs August-October

Refining Xplan around how you work

Super Cap calculator coming soon

- **Automated cap calculations**: Personal Concessional and Non-Concessional Caps calculated within Contribution Summary in Client Focus.
- **Seamless data flow:** Integrates with Xtools+, Optimiser, Retirement Funding, TTRAP, and Lifestyle Goals.
- **Intelligence:** Incorporates carry-forward and bring-forward rules automatically.
- **Comprehensive imports:** Total Super Balance, unused concessional caps, non-concessional contributions, and bring-forward status included.



What is Workflow Starter Kit

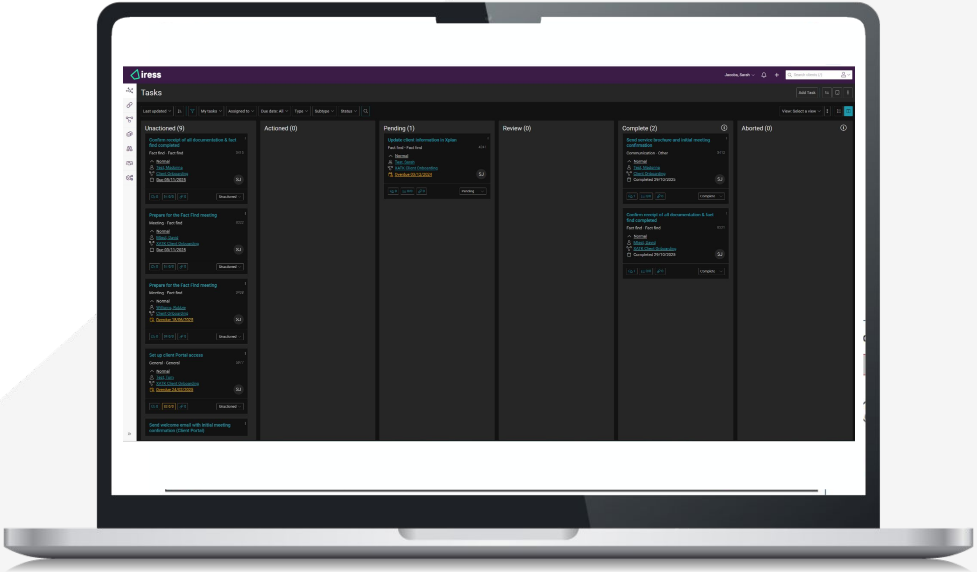
The Workflow Starter Kit is a new learning resource designed to empower our Xplan customers and drive greater efficiency.

It's a direct response to customer feedback, providing an 'off-the-shelf' starting point for building workflows and maximising their use in Xplan.

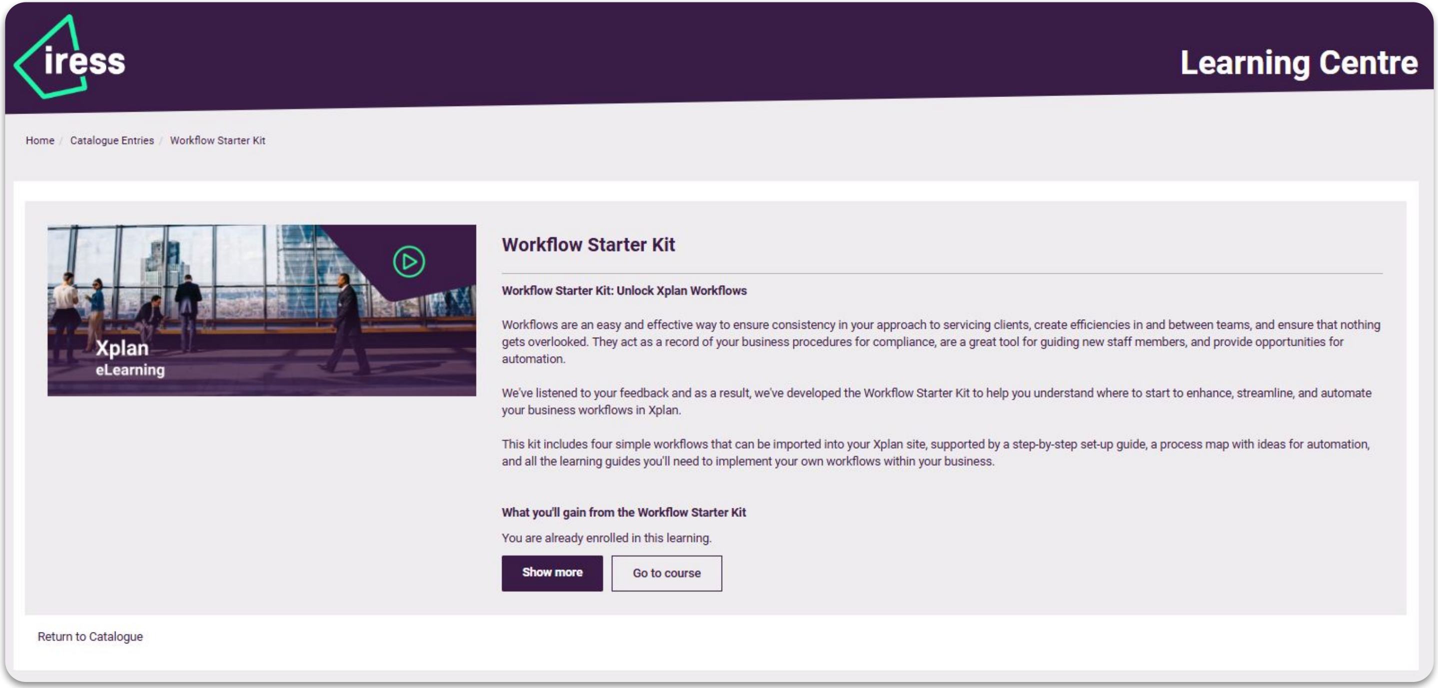
Our ultimate goal is to provide self-service, intuitive learning content that anticipates every customer question, making workflows easy to manage without direct intervention.

Workflow Starter Kit Key features

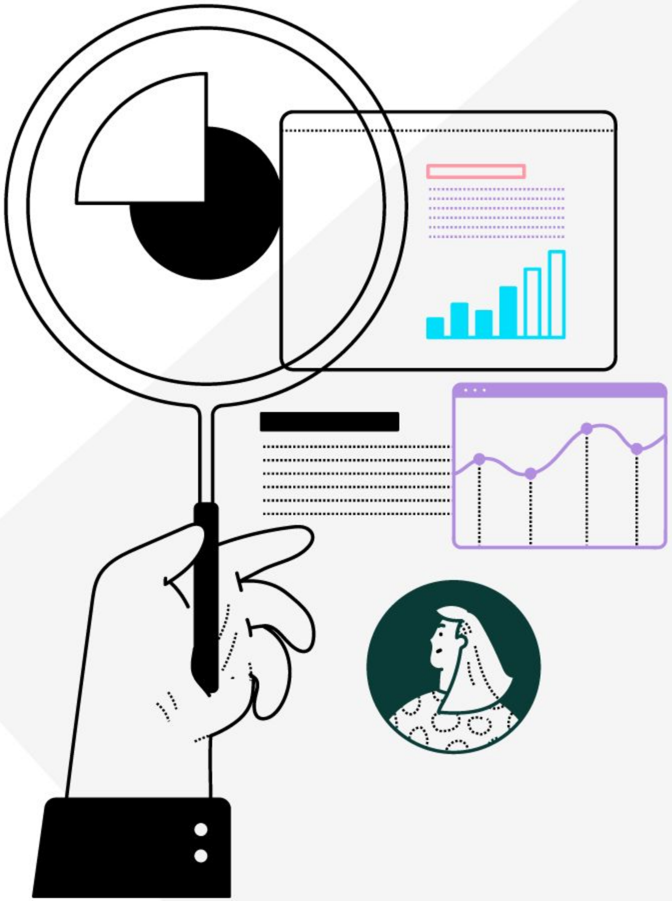
- **Four** simple workflows that can be imported into an Xplan site.
- **Easy** to follow setup instructions.
- **Automation** ideas to help customers customise their workflows.
- **Links** to all necessary learning guides for workflow implementation.



Find out more...



2026 Xplan



Continuing the product strategy for a cohesive, simpler, reliable future

Cohesive

Seamless data integration and streamlined workflows creating a more efficient experience

Simpler

Innovated workspace and intuitive, standardised UI that simplifies daily tasks and boosts efficiency

Reliable

Optimised tools that meet industry standards providing dependable outcomes and reduced risk

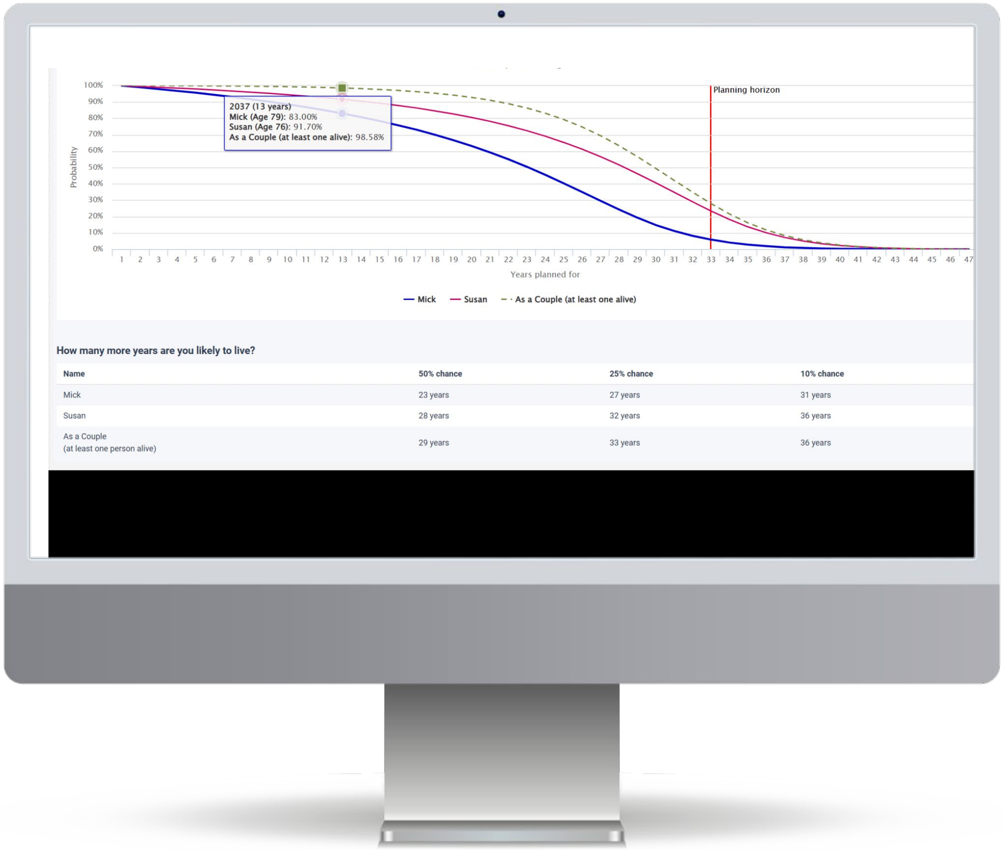
Xplan features roadmap overview: proposed items (2026)

Potential roadmap items being explored — not all are guaranteed to progress.

Domain	Cohesive	Simpler	Reliable
Customer Relationship (Client Focus, Workflow, Client Portal)	Integrate with market-leading third parties to **improve the presentation and visualisation** of advice	(subject to Pilot) **Reduce the time spent writing and saving file notes** in Xplan using AI (launch) **Improve error messaging** in Xplan to help users with the open issue.	Review **unused Xplan functionality** to identify ways in which we can streamline CRM performance and usability. Enabling **advisers** to manage **Fixed Term Agreements** (Non-ongoing service agreements)
Advice Solutions (WealthSolver, Risk Researcher, Xtools/Xtools+)	WealthSolver Insurance proposal **integrate** with Risk Researcher. **Asset information and Insurance fees** to automatically flow correctly into Xtools+ Ability to record and track **transfer balance account** credits and debits needs	Fully **integrate lifetime income solutions to Xplan** across product selection, strategy, modelling and SOA Simplify **Super-linked and Flexi-linked** products handling in existing insurance across Xplan Streamlined **Assets and Liabilities** **Automated Cash flow** to minimise data entry for start of period and regular transactions	Capture Insurance **Commission Consent** from policyholders in Client Focus To comply with **Division 296 tax** on super balances over $3 mill in Xtools modelling
Portfolio		Further enhancements to the quick trade order pad for a **shorter and more efficient order creation journey**	Deploy Appropriate **Exchange market data flags** e.g. delayed, end of day Supporting valuation and modelling of **Cryptocurrency Investments** in Portfolio
IressNet Datafeed	Expand your scope and coverage by adding new **industry super** data feeds (Australian Super and Brighter Super) New **investment** data feed (SelfWealth).	Make it **easier** to track the **processing status** of each datafeed.	Uplift the data security model for Client & Account relationships to advisers, to **increase the security of data sent to Xplan sites.**
Payment Solutions			
Data Solutions	(subject to Pilot) **XBI** bringing enhanced reporting, business insights, and self-service analytics directly within Xplan		

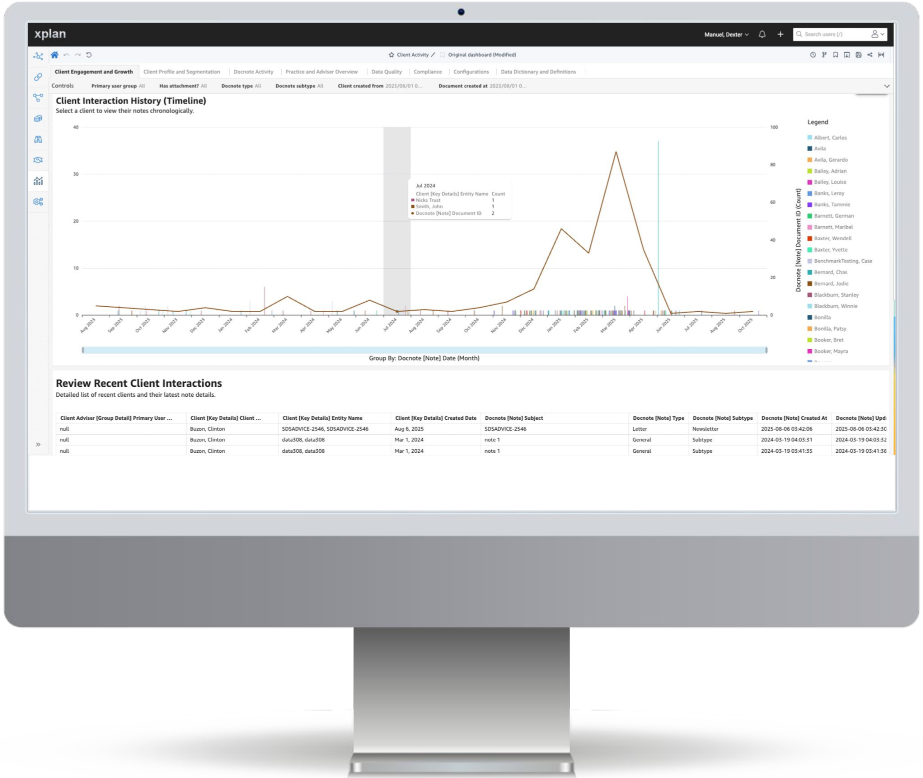
Retirement Income solution

- **Streamlined**, end-to-end retirement advice journey from fact-finding to advice review.
- Lifetime income modelling and strategy tools, initially focused on the **decumulation phase**.
- Data-driven insights and **integrated** product information to **simplify** adviser decision-making.
- Platform for **industry collaboration,** starting with Challenger, to expand access to retirement income solutions.



Unlocking smarter decision-making with Xplan Business Intelligence

- **Unlock insights:** Access near real-time data, refreshed hourly, without leaving Xplan.
- **Eliminate reporting bottlenecks:** Replace spreadsheets and legacy tools with automated, dynamic dashboards.
- **Strengthen compliance oversight:** Track key metrics, document activity and advice delivery in real time.
- **Take control of your own data:** Explore, visualise, and interact with the metrics that matter most. No technical skills required.
- **Future-proof your business:** Built on modern, cloud-native BI with a clear path to AI-powered and predictive analytics.



Scan the QR code to
register interest in 2026.

Let's continue the conversation

[Advisely]

[Iress Community]

[Iress Learning Centre]

Support available

Contact our team of specialists

Australia: 1300 1300 69
New Zealand: 0800 448 505
or via [Iress Connect]

Feedback

What did you think? Send in your suggestions and feedback.

CPD Quiz

Complete the quiz and we will send you your CPD certificate.

Thank you