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Xplan is leader in overall planner satisfaction
PlanTech next highest rated Software

Xplan Technology has been ranked the number one planning software provider by overall user satisfaction in the 2006 Investment Trends Planner Technology Report, with 44% more good/very good ratings than its immediate peers. This represents the second consecutive year Xplan has received the highest satisfaction scores in the planning software market.

The 2006 Planner Technology Report examines the adoption and usage of technology by financial planners and paraplanners. Mark Johnston of Investment Trends comments that "Xplan and PlanTech scored highest in their categories, with Xplan particularly strong in ease of installation and use, speed, stability and practice management support."

Andrew Walsh, Xplan General Manager, said that "over the past year, Xplan has grown primary market share by nearly 40% according to survey results. And now cemented as the clear number 2 provider in the IFA market (before accounting for PlanTech), we are pleased to have arrived here while nurturing a satisfied user base.

It is our view that a key to this result is the flexibility of the Xplan technological solution that provides opportunity for dealers to tailor the Xplan system to their needs, promoting suitability for end users. This is uniquely available in Xplan and is in contrast to non-configurable competitor solutions."

PlanTech's strength in risk product selection was also a standout in the report, which follows Xplan's acquisition of PlanTech in September. "This positions Xplan as the clear preferred provider of investment and risk technology amongst planners, reaffirming our strategy to deliver leading-edge adviser tools", added Walsh.

"IRESS is extremely pleased with the continued strong growth of Xplan which, complemented by the recent PlanTech acquisition, underlines our wealth management commitment. And this result echoes that which we at

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IRESS value above all – service and support to our clients. The fact that this is achieved during such a strong ongoing growth is a credit to the Xplan team", said Peter Dunai, Managing Director of IRESS.

Without complacency, but with this confirmation of direction, Xplan with PlanTech continues its product development, which is tightly aligned to user demand:

- Following the initial integration of PlanTech risk research data in September, the broader integration of the extended Risk Researcher module will be available to clients in early January 2007.
- The development and delivery of CommPay, an enterprise commission management and pay system for dealer groups and advisers, remains on track for release during Quarter 2 2007.
- Xplan's Exception & Compliance Management system is already rolling out to clients and is highly anticipated as a valuable tool to assist dealer groups with automated and proactive monitoring of clients and advice, and to assist advisers seeking automated portfolio and client management monitoring tools.

For further information, please contact:

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