Summary of Xplan functionality

Xplan

XPLAN's CLIENT FOCUS module to manage your client base efficiently, effectively and comprehensively, by communicating, facilitating, storing, recording, organising and managing that business-critical client data.
At your fingertips, you'll have personal contact details, financial info and marketing preferences. You can filter these, in order to communicate promptly, relevantly and sufficiently often to be heard and remembered.
Features and functionality:
- Generate advice reports
- Manage the advice process
- Create correspondence
- Design email templates
- Store files notes and documents
- Make calendar appointments
- Manage tasks and workflow
- Coordinate client campaigns
- Search and report

XTools(Standard functionality included in Xplan)

XTOOLS is a suite of marketing calculators for financial advisors. It uses cutting-edge software – imagine the love child of an abacus, a car engine and a human brain, only prettier - to visually display complex concepts relating to clients' needs.
Aids in advice and guidance on investment (savings, education, investing), retirement, tax, insurance, debt (loans, debt consolidation) or lifestyle, you can use XTOOLS' rich functionality to:
- Create illustrative charts, graphs and tables
- Optimise input values
- Access unlimited scenarios for projections
- Go beyond 'best', 'worst' and 'average' scenarios
- Store and integrate client information
- Incorporate output into your Record of Advice tool
- Auto-update in line with legislation
- Achieve consistency across tax and investment
- Assess even those uncertain variables
- Create financial plans in Microsoft Word or PDF

Risk researcher research:
Is an interactive risk insurance solution to determine client's risk needs, assess, model and recommend risk solutions.
- Integrates client needs and research information
- Maintains preferred and approved product lists of Life companies
- Analyse and compare expired and current products
- Perform a complete analysis of quick research
- Create a new house view

Risk research business Needs Analysis (BNA):
Presented in an easy-to-follow wizard format, BNA quantifies the needs of a business in three major areas (all of which safeguard a business against loss of revenue, interrupted shareholder continuity and negatively affected borrowings):
- Shareholder protection
- Key people

- Contingent liability

Benefits:

- Engage business clients in a logical and clear discussion
- Support your recommendations with cold, hard facts
- Address individual role-players and the business at large
- Gain insights into extra areas: debt, asset replacement, alternative financing
- Access end-point summaries that can be easily filtered

Lifestyle modelling

XTOOLS+ is designed to create and compare investment strategies and scenarios over any time frame, including projections. Using modelling that can be applied to a single entity, XTOOLS+ can incorporate client objectives, cash flow and tax, as well as consider holdings, property, pensions and personal assets. XTOOLS+ uses two facets of financial life to build wealth management models:

- Lifestyle Planner allows advisors to plan for clients' pre- and post-retirement needs to remodel and reposition assets across that client's lifetime.
- The Corporate Entity Modelling functionality enables advisors to model trust or company assets and distributions on behalf of clients.

Portfolio (Investment portfolio System):

XPLAN's IRESS PORTFOLIO SYSTEM allows you to construct, review, analyse, configure and even make projections about clients' portfolios, no matter how simple or complex they may be. Even diverse investment portfolios are supported.

Benefits:

- View portfolios at multiple levels
- Quickly analyse and report on tax, valuation and performance
- Use approved product lists (APLs) to create model portfolios
- Access an extensive list of data-feed providers
- Integrate with third-party research providers
- Get yourself connected in order to execute trades
- Give clients online access to IPS data

Alerts manager:

Let's advisors monitor their client data via an alerts mechanism.

- Run automated exception based rules across the client database
- Provides trend and risk management reporting
- Allows for setting priority levels and filtering client breeches

Client Online Access:

It's an interface that uses an administrator interface to adjust client access, so they see what they need to see. You can even integrate this with your own website, making log-in seamless and easy, and using your own corporate identity to brand it.

Viewable information:

- Portfolio information like valuations, transactions and reports
- Tax information
- Relevant marketing and news, from you and the industry
- Market data and orders – delayed or real-time
- Web presentations from you, if you're located far away

Benefits:

- Everything carries your branding, even the reports to clients
- You can tailor the system yourself, without web developers
- It integrates with your CRM, enabling data collection
- You can track which clients use it, how often and for what
- No hardware or software installation required. It's all online