

Xplan tops software rankings

16 April 2010 | by Mike Taylor



Xplan has emerged as the highest rated planning application in the latest **Investment Trends** Planning Software Report, while **Coin Office** retained its top position for best modelling and State of Advice production functionality.

The Investment Trends Planning Software report, released this week, also revealed the degree to which dealer groups and financial planning firms are using the software as a planner productivity tool.



Investment Trends principal Mark Johnston noted that for the first time the planning applications had reported on what advisers actually do with their time.

He said the development of applications in 2009 focused on planner productivity, with functionality to help advisers work more efficiently and provide adviser organisations with tools to benchmark the productivity of their advisers.

Johnston said a key area of development for Australia's leading planning application providers over the past year had been helping advisers to do more for clients with developers delivering on workflow functionality and the ability for advisers to work on multiple clients at once.

He said a new generation of client facing planning applications was being introduced, with the planning application functionality shifting from providing traditional planning tools to developing client-focused planning applications.

According to Investment Trends' final analysis and overall ratings, Xplan headed the list, followed by Coin Office, AdviserNETgain, **VisiPlan** and Navigator n-link.

Asgard's AdviserNETgain was awarded best integrated planning/platform hybrid.

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