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Xplan tops software ratings

Xplan has retained the highest overall rating in this year's Investment Trends Planning Software Report.

Closely behind Xplan is COIN, followed by AdviserNETgain, VisiPlan and Navigator n-link.

Coin Office retained its top position for the best modelling and statement of advice production functionality.

While Asgard's AdviserNETgain won the best integrated planning/platform hybrid in 2009.

The report noted AdviserNETgain is the first planning application to be fully integrated with workflow from an investment platform, which allows advisers to manage their productivity.

Indeed, this year Investment Trends researchers found financial planning technology firms had focussed on ensuring planners can work more efficiently and measure their productivity.

"For the first time, regardless of which of the leading planning applications they use, they now have reporting on what advisers do with their time," said Mark Johnston, principal at Investment Trends.

The research used analyst reviews of seven fully featured planning applications across more than 500 feature and functionality points. ●