

## Midwinter takes on Coin, Xplan

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By Elise Burgess | In Financial Planning

Independent advice technology developer, Midwinter, is set to launch its own CRM for advisers to compete against industry giants Coin and Xplan.

After releasing earlier this year, the off-the-shelf CRM will target advisers that want ease of use for the product, simplifying their own CRM to compete with other "complex" CRMs on the market.

"An example of that would be something like a data feed, which can be very complicated for an adviser to understand and historically an advisers would have to go an set them all up for themselves," said Julian Plummer, managing director, Midwinter.

"However, in our CRM we would set the data feed up for them so they don't need that technical/IT expertise anymore as we would do all that for them."

The independent developer wants to build itself up in this field after earning the top spot in Investment Trends 2010 Planner Technology Report for overall satisfaction.

In related news, Midwinter will soon be releasing a self-managed super fund research project for advisers while expanding its AdviserTECH framework to suit the latest Future of Financial Advice (FOFA) reforms.

"What we are seeing are licensees and advisers purchasing the AdvsierTECH compliance tool due to FOFA structure being pushed. Advisers are under a lot more responsibility to understand the technical and strategic options their clients have," said Plummer.

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