

# Financial Standard

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Tuesday, 01 Apr 2008

## TECHNOLOGY

### **IRESS software gets thumbs up**

**Tuesday, 01 Apr 2008 12:28PM**

IRESS' planning software, XPLAN, has recorded the highest level of satisfaction amongst planners for fully featured planning software, a new report shows.

According to the latest Investment Trends Planner Technology report, XPLAN – a web-deployed platform for planners – also topped the list for ease of use, constructing portfolios and scenario modeling among others. This is the third year in a row that IRESS has snagged the top spot.

The report also found IRESS' combined market of adviser desktops had grown from 15 per cent in 2006 to 50 per cent in 2007 following the firm's recent acquisitions of PlanTech and VisiPlan.

For most advisers, the pre-population of forms by planning software was nominated as the most desired integration improvement to boost their business. Data from master trusts and wraps, streamlining transactions and online applications, redemptions and switches also featured strongly as needed improvements.

The report also outlined the continuing trend of planners favouring internet accessible storage of client data.

According to Investment Trends principal, Mark Johnston, "The survey details that the number of planners who would prefer client data to be stored locally has declined every year since 2004."

"The number of planners who would prefer to use planning software installed on their own computer had also declined from 42 per cent in 2005 to 27 per cent in 2007," said Johnston.

*Ruth Liew*

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