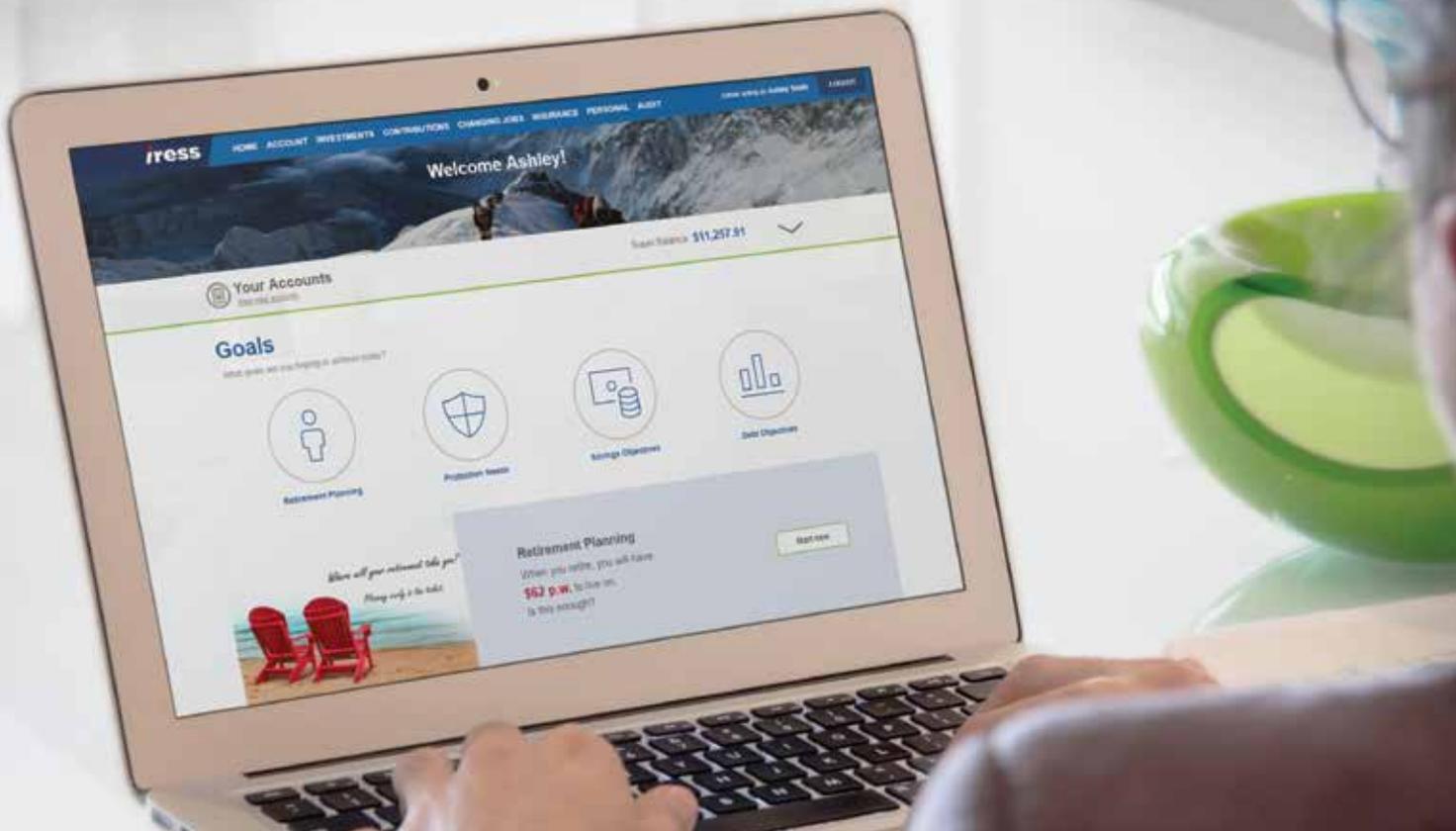


AUTOMATED PERSONAL ADVICE

YOUR MEMBERS. YOUR ADVICE. DELIVERED ONLINE.



Tell me how it will help me

Member engagement in superannuation can often be low or non-existent. In addition, an increasing number of consumers—across generations—are choosing to research and make financial decisions online. IRESS recognises these challenges and has devised a contemporary, intuitive and engaging member experience.

IRESS' automated personal advice solution allows you to service members wanting superannuation advice digitally. With your own branding, this built-for-scale technology allows you to diversify your service offerings, extend your value proposition and directly engage with your members easily and effectively.

AUTOMATED PERSONAL ADVICE

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Tell me what it actually does

Automated personal advice provides your members with a self-service advice offering, accessible from any device 24/7. It allows you to engage with members through the provision of a digital solution via online advice journeys targeting specific goals. This helps to improve a member's financial situation and support their changing investment, lifestyle and financial goals.

Tell me what others think about it

“Members can use the tool to set their retirement outcome, review their projection and then make choices to optimise their projected outcome. They can then implement any recommended changes to keep them on track.”

WA Super

Can you break it down for me?

- **Embed within your fund's member portal:** Easily and seamlessly incorporate with your existing member portal, drawing on already known member data to provide a head start on the advice journey.
- **Targeted goals-based solution:** Calls to action—utilising known member data—can be highlighted to show members if they need to take specific actions to ensure their goals are met.
- **Financial calculators and interactive advice tools:** The advice members receive—driven by XPLAN's powerful calculators—provides the same consistent and accurate calculations that your financial advice team would offer.
- **Triage and seamlessly transition into other advice channels:** All captured data is stored in XPLAN allowing advisers to 'pick up' the member's journey and provide either guided or comprehensive advice.
- **Obtain data analytics for targeted marketing to members:** Valuable analytics show you how members are both accessing and using the solution. With this information you can devise new advice opportunities and enhance member engagement.
- **Fully hosted and supported by IRESS:** Minimises the ongoing technical and costly overheads of managing your own custom solution.

Key member journeys



Protection needs: Protect what's important and have peace of mind.



Retirement adequacy: Stay on track with your finances by knowing your retirement adequacy.



Retirement income objective: Set your retirement income objective and get the most out of your savings.

Key functionality

Through APIs, this open architecture solution integrates with other superannuation registry platforms, websites and portals.

Additionally, this solution is available with native integration between IRESS' Acuity and Acuity Online products, as well as XPLAN and XPLAN Prime wealth management solutions; providing you with an end-to-end solution for super administration and member services.

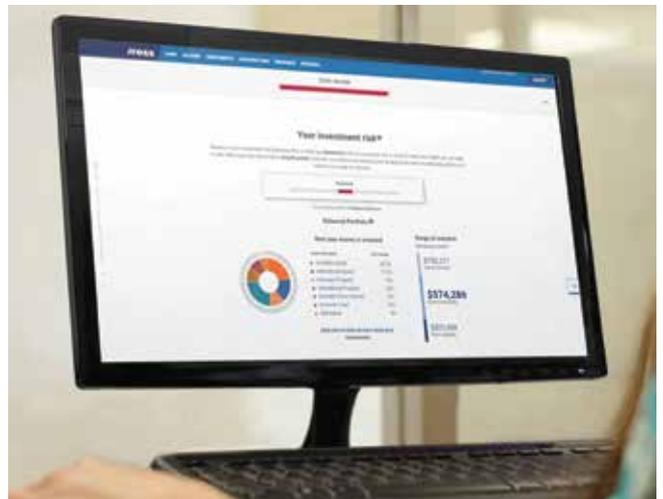
All member data is managed on one core platform, this reduces the risks associated with rekeying data between systems creating operational efficiencies.

What about service and support?

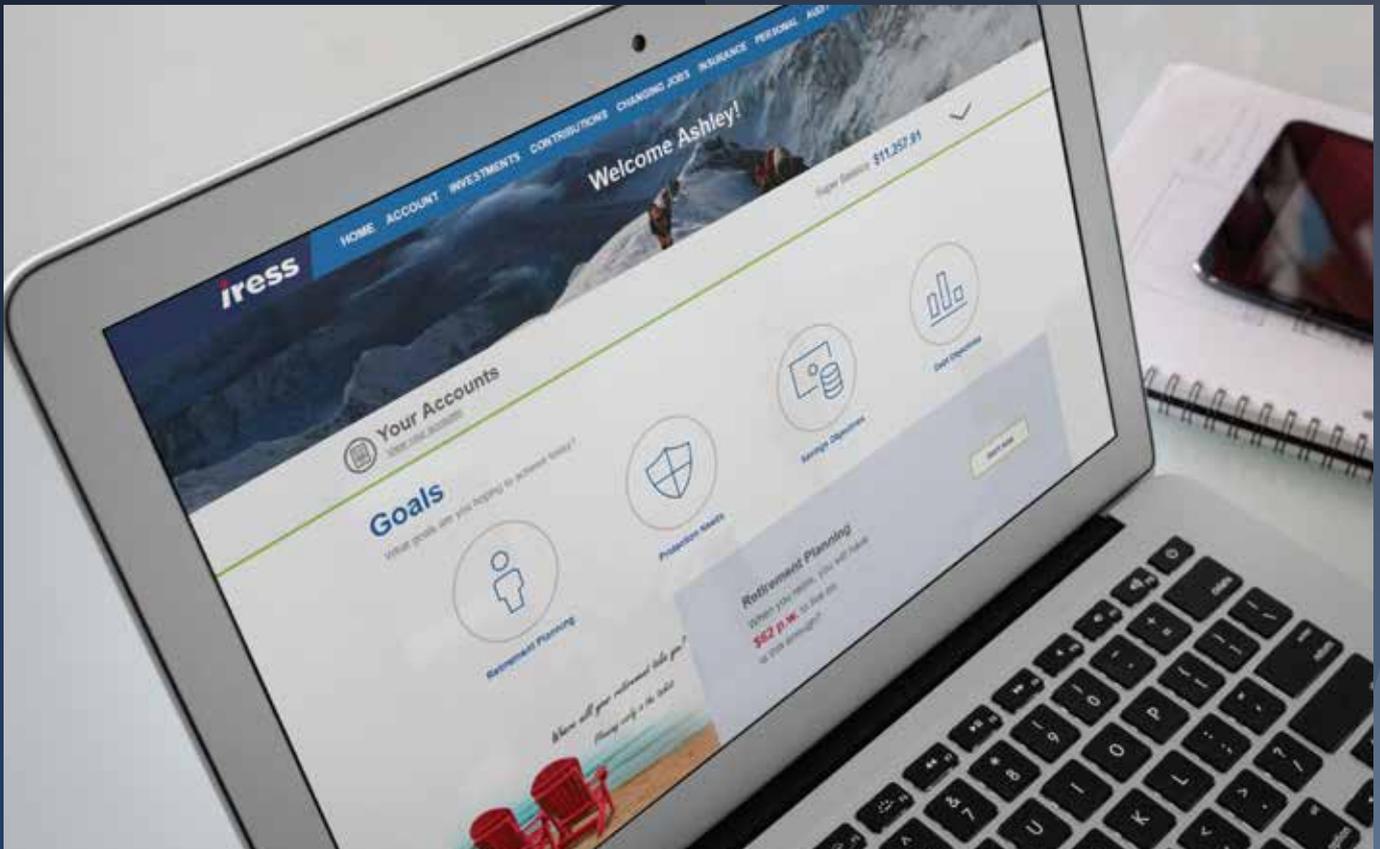
At IRESS, we understand software solutions go hand-in-hand with service and support. This is why we pride ourselves on thorough implementations, an expert-led support team plus relevant training with accompanying online resources. Learn more about our service and support offerings at [iress.com](https://www.iress.com).

Tell me how IRESS stacks up as a partner?

We know our clients don't only want software that works, they also want a technology partner that works with them and that they can trust and rely on to design, develop and deliver creative and reliable software solutions. Check out our credentials at [iress.com](https://www.iress.com).



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HOW DO I CONTACT YOU?

Contact us today to see it in action and how it can work for your business.

[iress.com](https://www.iress.com)

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