

IRESS WEALTH MANAGEMENT

About us

We are a global team of 1 950 people building software that helps the financial services industry perform at its best.

From the world's most iconic financial services brands to advice firms of all sizes, challenger banks, insurers, investment managers, traders and brokers, more than 9 000 businesses and 500 000 people use our software to help them perform better and deliver more.

Value proposition

Choose the advice software rated best by the industry. Xplan is award-winning financial planning and wealth management software for the financial services industry. Advice firms of all sizes rely on Xplan to deliver a complete and compliant financial advice service. With centralised client data and documentation, full workflow management and comprehensive reporting, Xplan makes it easy to reduce administration, maximise business opportunities and deliver high impact financial advice.

Contact details

Tel: 021 492 5500
Email: salesa@iress.com
Address: 5th Floor, Montclare Place, 35 Main Road,
Claremont, Cape Town
Website: www.iress.com

Regions supported

All of South Africa

Quote reference and pricing

To qualify for the preferred rate or service enhancement, please quote the following reference:

Quote reference: Allan Gray Adviser Services

Pricing: Discount of 10% on financial planning and wealth management software Xplan Standard or Xplan Pro.

Please contact us for a quote to meet your specific requirements.