Fund administration, member advice & everything in between.

Superannuation
iress.com/superannuation

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Tell me how it will help me

At Iress we understand that superannuation requirements change over the course of a member's lifetime. Our fund registry software and online portals, coupled with the Xplan advice software, enable super funds to tailor offerings to support individual member requirements; and build member engagement, loyalty and advocacy.

Iress superannuation software provides you with:

▶ Straight-through and exception-based processing.

▶ A verified SuperStream gateway for the transfer of messages between employers, super funds and the ATO.

▶ Regular legislative updates.

▶ Integrated financial advice software.

▶ Management of your fund admin.

The online portal helps keep your members engaged with their super and the full service you offer, and integrated advice software enables provision of financial advice to your members.

Give me the highlights

Fund administration and service that's both member and fund friendly.

▶ A single solution from one trusted provider.

▶ Flexibility to adapt to your fund and your members.

▶ Member access and engagement via a simple online portal.

▶ Seamlessly deliver personal advice services to your members.
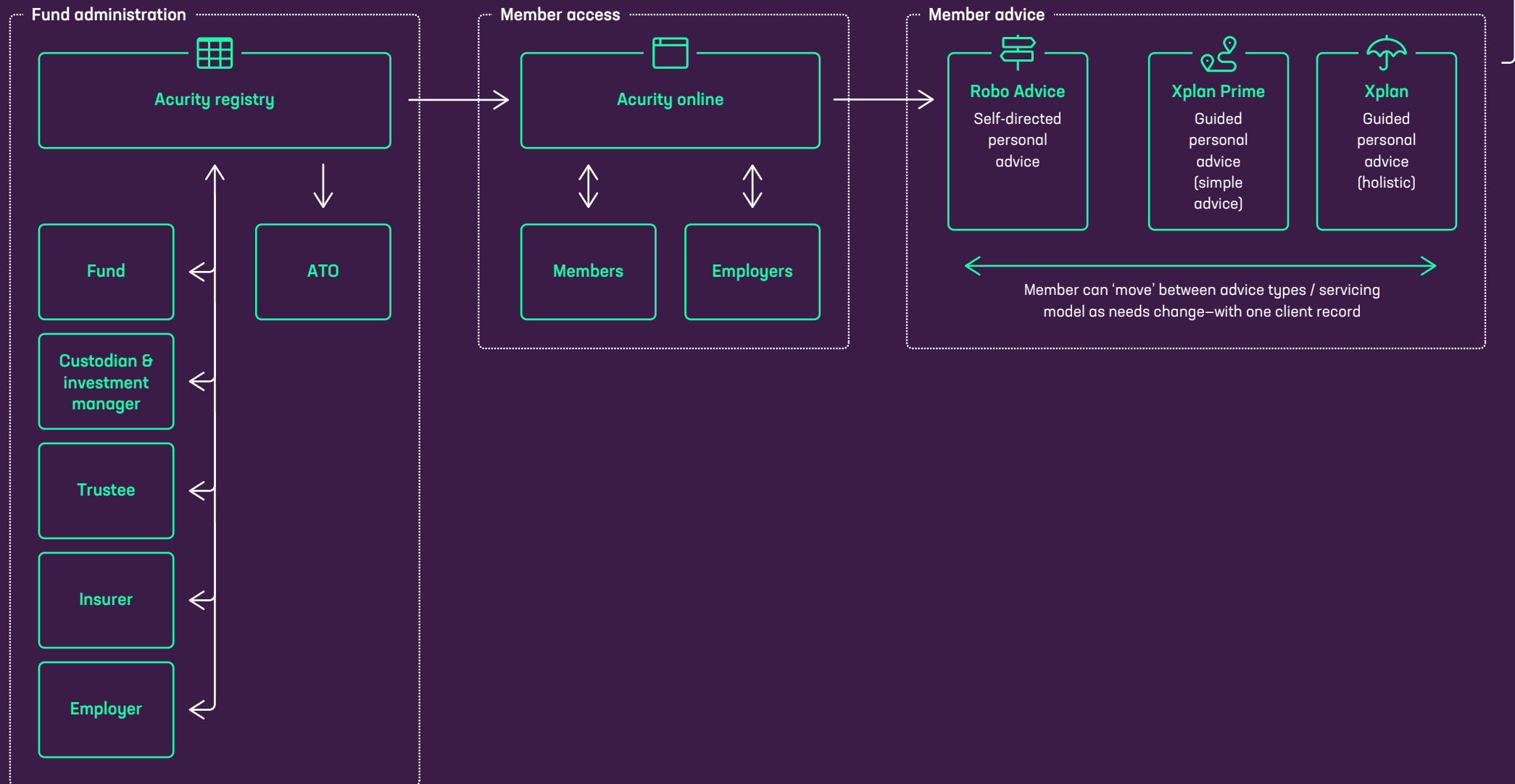
More than 4 million member accounts

Over $380bn funds under management

More than 50 funds

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Superannuation

Can you draw a picture for me?

Superannuation end-to-end offering

Fund administration

Acurity registry

Fund

ATO

Custodian & investment manager

Trustee

Insurer

Employer

Member access

Acurity online

Members

Employers

Member advice

Robo Advice
Self-directed personal advice

Xplan Prime
Guided personal advice (simple advice)

Xplan
Guided personal advice (holistic)

Member can 'move' between advice types / servicing model as needs change—with one client record

Superannuation

Can you break it down for me?
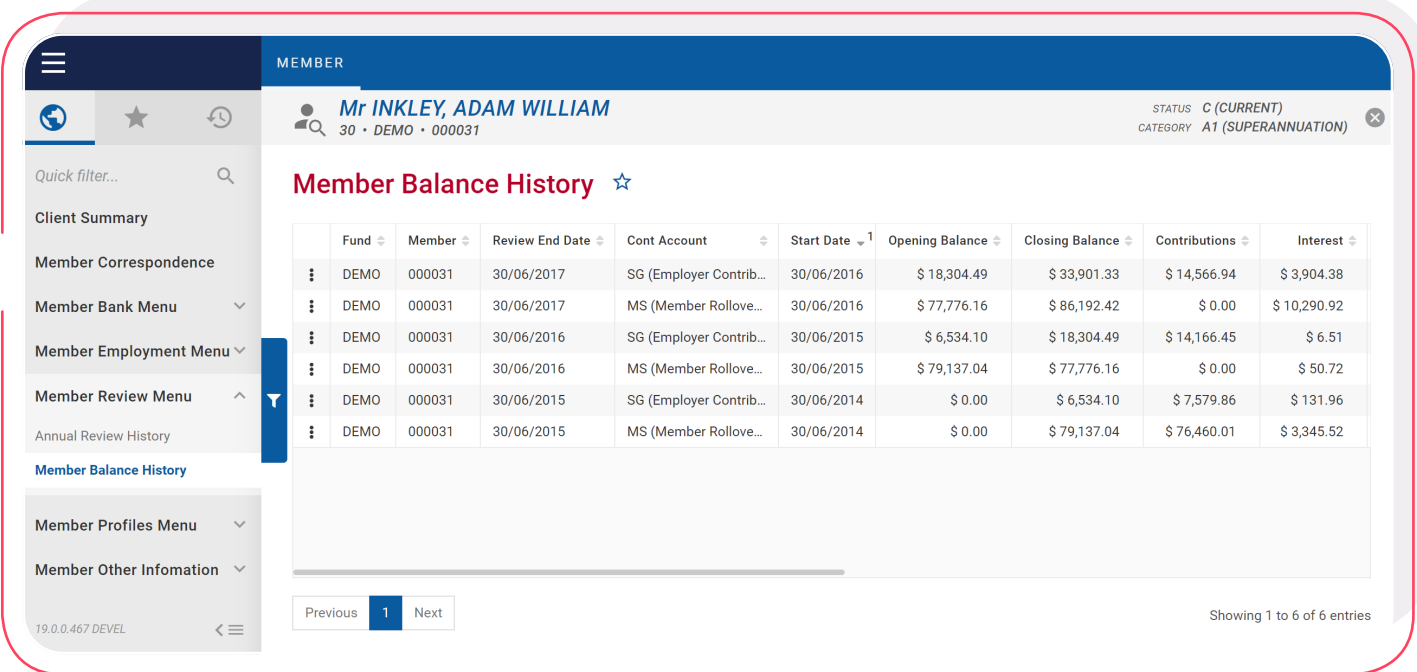
Fund administration

Acurity Registry

Available as hosted or on-premise software, this full-featured registry platform drives administrative efficiency and enables speed-to-market for new products and services.

Accessible 24/7 via your web browser, the platform supports a wide range of product types including defined benefit, accumulation, pension and hybrid products. It also supports a range of investment requirements such as direct equities, term deposits and managed funds.

The intuitive interface makes it easy to process transactions such as investment switches, benefit payments and other general member maintenance. These can then be actioned by your administrator or, through Acurity Online (or your own member portal) for your members to self-serve—driving efficiency and reducing risk associated with keying errors.
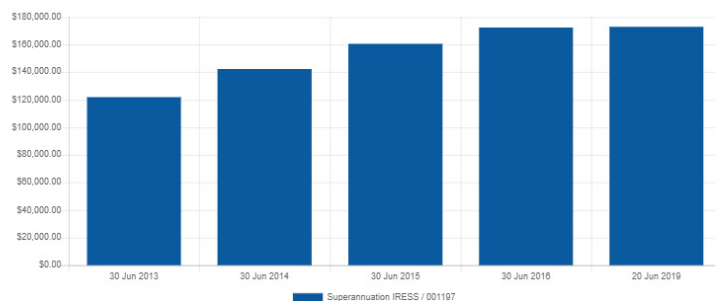

Acurity Balance History—Acurity maintains a full record of the member's contributions and balance movements.

Members can update details, manage investments, make contributions and more—online 24/7.
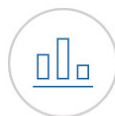
Member access

Acurity Online

Acurity Online is a fully transactional, branded and online portal for superannuation members, employers, advisers and administrators. It allows you to retain control of your portals while Iress manages hosting and integration back to your registry.

Iress has created a wide range of member journeys and will provide you with various portal style templates without the hassle of a ground-up build. Alternatively, if you provide Iress with your design and style guide, your portal will be built using our wide range of standard integration services. This process takes the hassle out of building your custom site, and at the same time reduces ongoing maintenance.

Unlike typical white-labelled, out-of-the-box software, Acurity Online has an inbuilt content management system (CMS) allowing you to stay in control. You can use the CMS to change content, update messaging and segment your members—enabling you to deliver tailored content to different member groups. The channel of communication can be adjusted by using if-conditions, and push notifications can be activated—allowing members to receive confirmation of their actions within their super account.
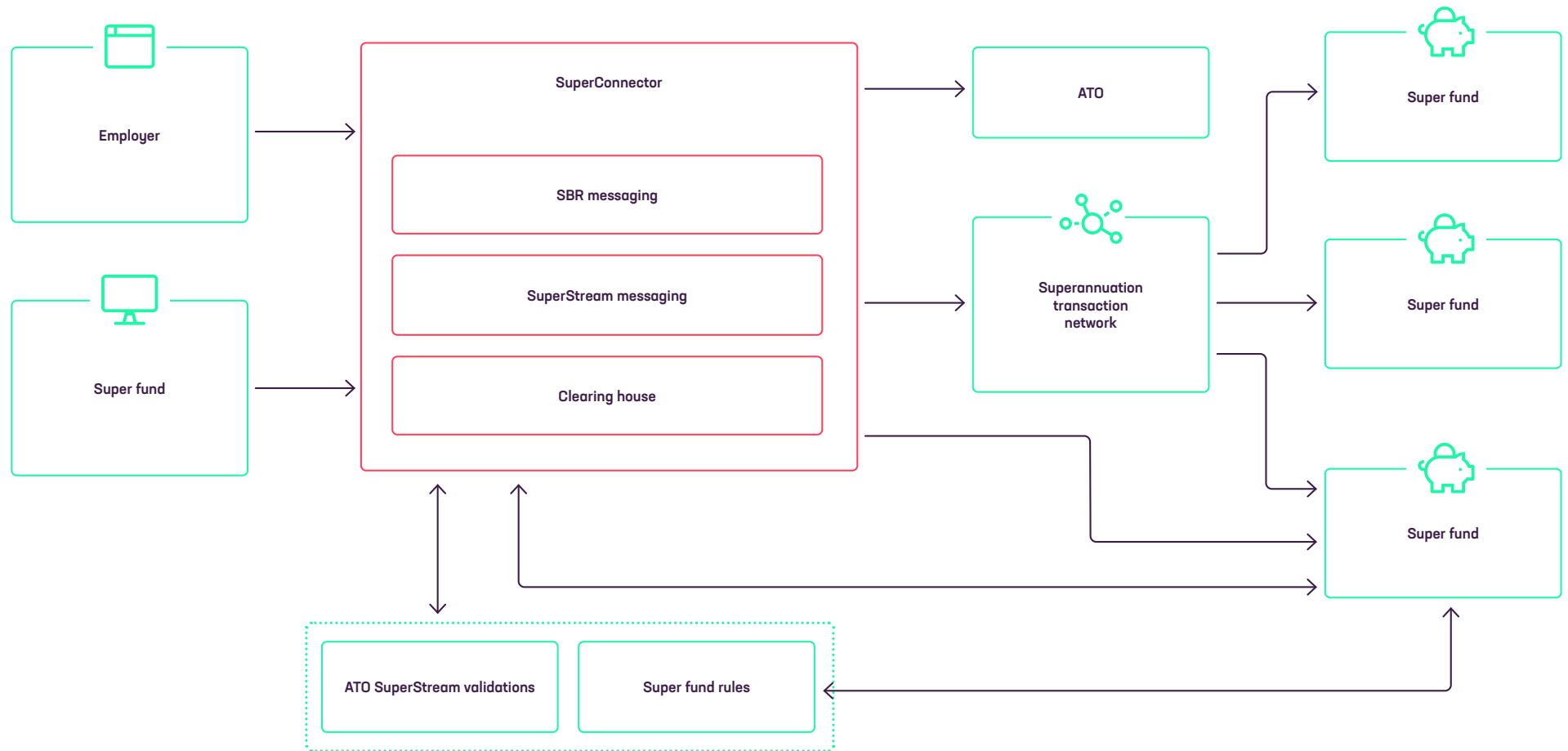
Save on your technology budget and focus on appropriately branding your portal for maximum impact and return. Have your portal functioning and looking exactly as you require.

SuperStream messaging & clearing house services for super funds & employers.

SuperConnector for super funds & employers

Employer

Super fund

SuperConnector
- SBR messaging
- SuperStream messaging
- Clearing house

ATO

Superannuation transaction network

Super fund

Super fund

Super fund

ATO SuperStream validations

Super fund rules

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SuperStream messaging & clearing house services for super funds & employers.

SuperConnector for super funds

SuperConnector is an accredited gateway operator for the transfer of messages—or messages and payments—between employers, super funds and the ATO.

- **SBR messaging:** Provides the information and automation you need to meet your reporting obligations for MAAS and MATS.
- **SuperStream messaging:** Provides the capability to transmit SuperStream compliant contribution and rollover messages.
- **Clearing house:** Enables employers to transmit data and payments, so they can meet their SuperStream obligations.

SuperConnector for employers

SuperConnector's clearing house service provides secure data transmissions between employers and super funds, to help you to meet legislative and compliance requirements. It supports employers regardless of whether or not they use payroll software. From one central portal you are able to:

- pay superannuation contributions to multiple complying super fund(s) for their employees
- add and manage employee data
- view your transaction history and access reporting.

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financial knowledge centre

Home | Modules | Articles | Videos | Life Events | Calculators | Quiz | Jargon | Extras

Hi Rob
This month's latest additions are...

Deductions and work-related self-education expenses

Life insurance

Super engagement: Your annual super statement

Tax refunds and investing in yourself

Palliative care: Facing mortality with care and support

Financial Knowledge Centre homepage allows you a fully branded page including images and your corporate colours.

Member content

Financial Knowledge Centre

Financial Knowledge Centre is a cost-effective, online resource with an impressively large catalogue of financial and life stage content designed for existing and prospective clients of financial planning practices. The resource comprises of learning modules, articles, videos, quizzes, life event materials, calculators and jargon busters.

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Member advice

Robo Advice

Robo Advice provides your members with a self-service advice offering, accessible from any device 24/7. It allows you to digitally engage with members 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.

Robo Advice enables members to execute strategies so they can achieve better outcomes. It covers a range of financial objective advice journeys such as retirement adequacy, insurance needs or savings goals and includes educational content to help members understand, and navigate, their financial well being.
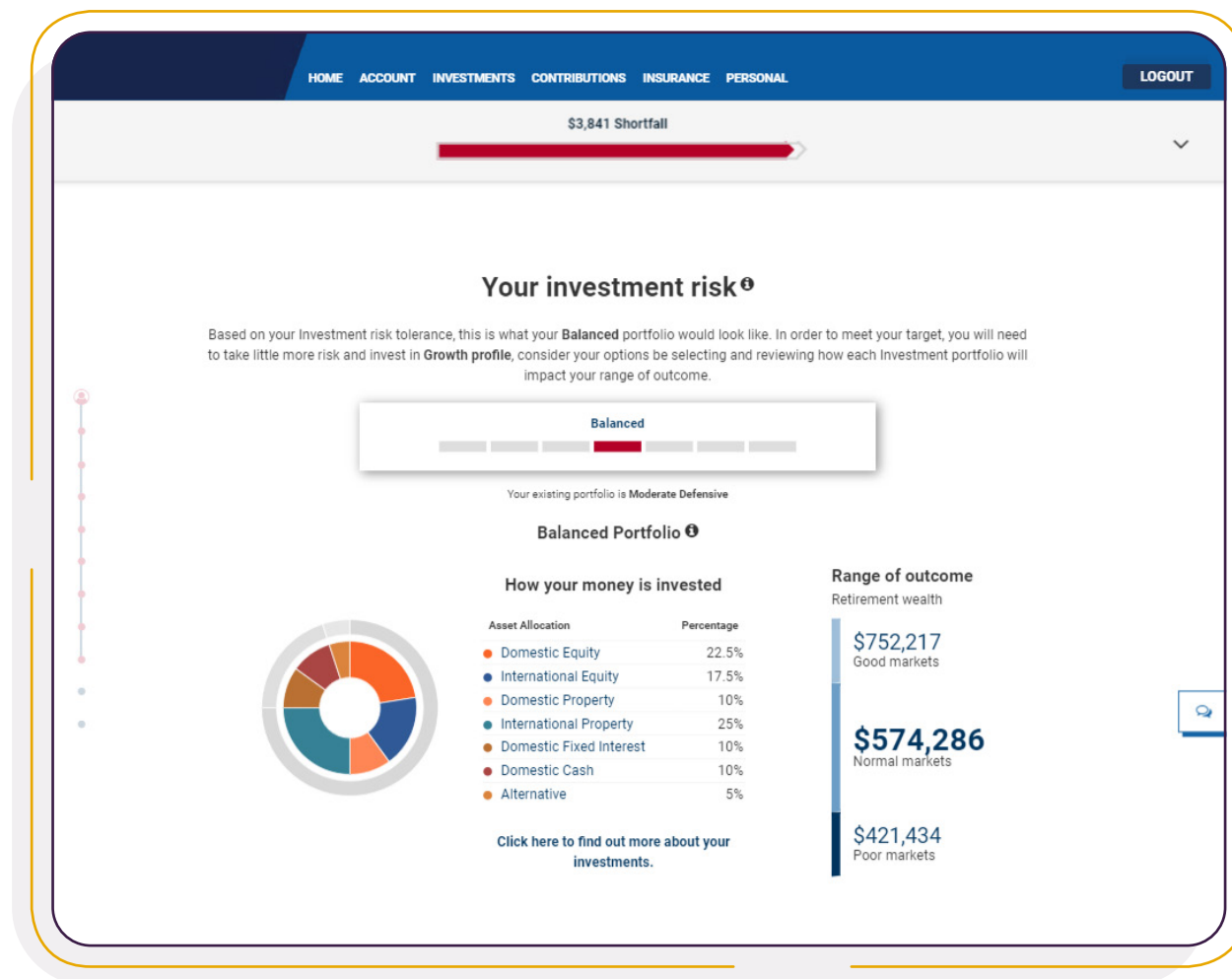
Risk profiling, understanding risk and matching to a preferred super portfolio option.
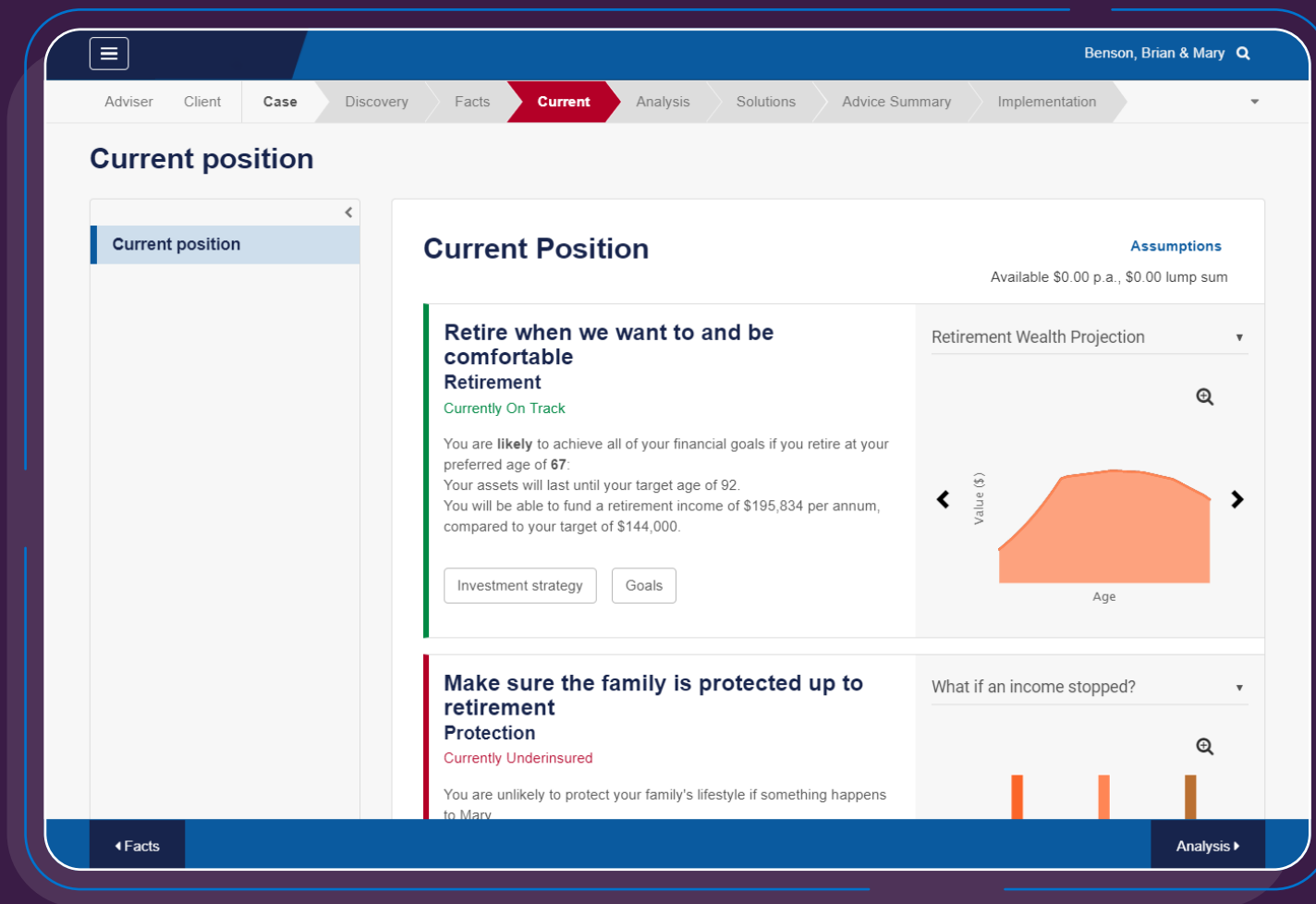
Xplan Prime

Xplan Prime is guided, objective-based advice software that streamlines the advice process for your clients with simpler advice needs. It guides you through a pre-defined client advice journey—from discovery and goal setting, current position and strategy modelling, advice documentation, implementation, and onward to progress tracking and review.

Via a single engaging and easy-to-use interface, Prime accesses Xplan's client management, modelling, portfolio, research and comparison, documentation and implementation tools. Prime gives you the flexibility you need to provide simple advice efficiently—so you can deliver quality advice outcomes to your clients.

Superannuation

Xplan

Xplan is complete and comprehensive financial planning and wealth management software.

Supporting all types of advice, from simple through to complex needs, Xplan allows you to manage the entire advice process from discovery, current position, goal-setting, analysis, strategy development, production recommendations, advice documentation through to implementation and ongoing review—accessing powerful modelling tools and product information.

All of your client data and documentation is stored in one central system with full workflow management capability and comprehensive reporting for business management. Xplan is fully hosted, web-based software and a certified Information Security Management System which complies with the requirements of ISO/IEC 27001:2013—ensuring your data is secure. Its comprehensive functionality means you can run your front, middle and back-office on one single platform.

View a client's entire portfolio.

What about service and support?

We understand providing great service and support goes hand-in-hand with delivering great software.

We pride ourselves on our thorough and timely implementations, reliable and scalable hosting services, robust back-up and recovery procedures, and ISO/IEC certified information security management.

Our expert-led support team, training programs and online user community all help our users get the most out of our software.

How does Iress stack up as a technology partner?

Every day, more than 9,000 financial services businesses use our software to make better decisions and deliver better results. We know they don't just expect software that works, they also want a technology partner that works with them.

Leveraging our industry knowledge and global experience working with clients just like you, we design, develop and deliver creative, reliable software that does what you need it to.

At Iress, we believe technology should help people perform better every day.

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Australia - Asia - Canada - New Zealand - South Africa - United Kingdom