

## **IRESS delivers integrated wealth management and trading solution to Close Brothers Asset Management**

Financial technology business IRESS today announced its integrated wealth management and trading solution is now in use by Close Brothers Asset Management (CBAM) and its clients.

IRESS has been working with financial planning and investment services business CBAM to deliver the expanded wealth management and trading solution. The solution follows the acquisition by IRESS of Pulse Software Systems in 2015, allowing an expanded new offering bringing together Pulse's portfolio management with IRESS' wealth management software platform XPLAN.

The consolidation of client assets and servicing onto a single platform represents a first phase delivery. This initial phase has provided CBAM with expanded CRM capability and a client-facing online portal to present portfolio information and allow end investors to initiate transactions. The resulting systems consolidation has also enabled CBAM to achieve its objective of delivering enhanced services along with cost reduction and improved efficiency.

Further releases are planned through 2017 and into 2018, delivering incremental client benefits along with further efficiency opportunities for CBAM by leveraging the scalable capabilities delivered by IRESS.

Martin Andrew, Chief Executive Officer, Close Brothers Asset Management, said: "We are continually looking at ways to deliver the highest quality of service to our clients in the most efficient way. Working with IRESS has allowed us to further integrate our services, boosting the level of flexibility and choice we offer, as well as providing a consistent client experience across channels."

Simon New, Group Executive - Strategy at IRESS said; "Our goal is to provide technology that meets our clients' needs, including helping our clients provide efficient and quality outcomes to their clients. IRESS' integrated wealth management and trading solution achieves this by bringing together the well-established offerings in Pulse and XPLAN. What we have delivered is part of a broader project to simplify CBAM's technology, build-in scalability and improving the experience for CBAM's clients and users."

**Ends**

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**About IRESS**

IRESS designs, develops and delivers technology for the financial services industry. IRESS is listed on the Australian Securities Exchange (IRE.ASX) with operations in Australia, New Zealand, the United Kingdom, South Africa, Canada, and Asia.

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