



**PlanPlus Inc.**

**CANNEX**

**For Immediate Release – January 7th, 2005**

## **PlanPlus Web Advisor™ Online launches Gold Level**

**PlanPlus Inc.** announces the release of the first OnDemand web solution for Investment Policy Statements and Financial Planning that will allow individual advisors to upload data from their mutual fund back office system. Advisors no longer need to key in basic customer information and can have their client accounts updated as frequently as they desire.

“A continuing challenge for financial services advisors has been the administrative burden of re-keying their back office data into their planning software, or updating information for planning or portfolio reviews. Usually time pressures mean that the planning process suffers. Our new **Web Advisor™ Gold** allows an advisor to import this data using the FundServ industry standard file format which can be created from many mutual fund back offices”, said Shawn Brayman, President of PlanPlus Inc.

In addition, advisors can manually enter the off-book or non-managed positions of their clients and the PlanPlus Web Advisor™ will use Cannex daily pricing data to update client portfolios on a daily basis. “This dramatically reduces the time required for an advisor to perform an annual review”, said Brayman.

“CANNEX provides Canadian mutual fund and seg fund prices and information, as well as end of day North American stock price data from 5 major stock exchanges. Instead of having to update this information manually, PlanPlus Web Advisor clients now have ‘Simply reliable data’ from CANNEX at their finger tips”, said Alex Melvin, President of **CANNEX Financial Exchanges Limited**.

The PlanPlus Web Advisor™ creates Investment Policy Statements, Client Planning Assessments and the Personal Financial Strategy documents, which are just three of the over 30 online planning and practice development tools advisors can utilize. The integrated action plans create natural transition mechanisms to ensure that all of a client’s needs are addressed, generating maximum opportunity for business for the advisor.

### **About PlanPlus Inc.**

PlanPlus Inc. is a Canadian firm that provides wealth management solutions to financial services firms worldwide with users in North and South America, the Caribbean, Asia and Europe.

For further information about PlanPlus Inc., visit [www.planplus.com](http://www.planplus.com) or contact: Elaine Hartjes, PlanPlus Inc. – [elaine@planplus.com](mailto:elaine@planplus.com) or 705-324-8001 ext. 307

### **About Cannex**

Cannex specializes in gathering, compiling, and redistributing comparative information about products and services offered by financial institutions in Canada, the United States, Australia and New Zealand.

For further information about Cannex, visit [www.cannex.ca](http://www.cannex.ca)