

## PlanPlus Inc.

FOR IMMEDIATE RELEASE

### **Credential Financial Inc. Deploys PlanPlus Web Advisor for Financial Planning**

**LINDSAY, ONTARIO, November 4, 2008** – Credential Financial Inc. has released PlanPlus *Web Advisor* as their integrated financial planning solution, available to over 230 credit unions. PlanPlus Inc. is the Canadian-based developer of *Web Advisor*, an award-winning web-based financial planning software program that is being used in 10 countries worldwide.

“We decided to work with PlanPlus because their *Web Advisor* solution allows us to support the unique needs of our credit union members. We’re able to provide individualized branding for each credit union,” said Paul Isaacson, Senior Vice President, Distribution and Sales at Credential®. “At the same time the PlanPlus solution provides a common technology platform and integration to both our mutual fund and securities back offices,” Isaacson added.

Credential will be working with PlanPlus to provide this integrated solution, which will include training and support for credit unions and will help credit unions deliver more sophisticated wealth management solutions to their members.

“We are excited about this working relationship,” said Lynne Myles, Executive Vice President of Business Transitions at PlanPlus. “Credential and their partner credit unions are committed to providing the highest levels of quality advice using PlanPlus’ state-of-the-art web solution. The scalability of *Web Advisor* and our ability to do custom branding for individual credit unions were key components for a successful solution.”

#### **About Credential Financial Inc.**

Credential Financial Inc. is the national wealth management company of the Canadian credit union system. Offering a full suite of financial products and services, Credential and its member companies (Credential Asset Management, Credential Securities, Credential Direct, and Credential Insurance Services) provide top quality investment and insurance advice to investors.

#### **About PlanPlus Inc.**

PlanPlus Inc. provides advice centric wealth management and financial planning software solutions to financial services firms worldwide. PlanPlus has become a world-recognized firm with its ground-breaking software PlanPlus Web Advisor and industry-leading training and service offerings. PlanPlus has users in North and South America, the Caribbean, Asia and Europe. PlanPlus Inc is a Canadian company established in 1990. It is privately owned and located in Lindsay, Ontario.

Website: <http://www.planplus.com>

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