



## PlanPlus Inc.

FOR IMMEDIATE RELEASE

### PlanPlus Announces New VP Global Sales & China Operations

**LINDSAY, ONTARIO, October 1, 2008** – PlanPlus Inc. announced today that Brad Greer CFP<sup>®</sup>, CPA, PFS has joined them in the role of Vice President of Global Sales & China Operations. This is a new role designed to focus on extending PlanPlus' sales in international markets as well as establish additional operational depth in Asia to support PlanPlus customers globally.

Since 1983, Brad worked for Wells Fargo Private Client Services in various financial planning roles including Director of Financial Planning Technology and most recently Director of Financial Planning. He was the chief architect of the Financial Planning Portal at Wells Fargo, a web-based comprehensive financial planning system used by over 3,000 Wells Fargo Brokers, Private Bankers, Trust Officers, and Portfolio Managers to profile their clients, analyze their current situation and propose and implement recommendations. The server-based solution revolutionized the way Wells Fargo financial advisors access financial planning tools, make presentations to their clients, implement financial solutions, and allow sales managers to track success.

Greer is also a passionate and active volunteer. In 2007, Greer received a three month "Volunteer Leave Award" from his former employer Wells Fargo Bank, to serve the Beijing China-based Financial Planning Standards Council of China and the Financial Planning Association (FPA). While in Beijing, he was instrumental in developing Wealth Management training for bankers and sharing CFP continuing education best practices. Besides helping others, Greer feels his experiences built up his knowledge about wealth management and educated him about best practices from around the world that can be applied inside a financial services company. Brad currently serves as the chair for the FPA's Asia-Pacific Geographic Focus Group comprised of planners representing eight countries in the region.

"Brad is a perfect addition to the PlanPlus management team," said Shawn Brayman President of PlanPlus. "Money Magazine named Brad as one of the US's top financial planners and he brings a wealth of experience from a financial planning, a technology and a wealth management perspective to PlanPlus. His unique background combined with his ability to speak English, Chinese, and Spanish makes him the perfect candidate to help expand our global sales effort."

PlanPlus currently has users in 10 countries in North America, South America, the Caribbean, Asia and the UK. PlanPlus' Web Advisor solution also supports other jurisdictions and provides services in four languages – English, French, Spanish and Chinese.

"I was introduced to PlanPlus a few years back as they were the only major solution provider with a multi-lingual, multi-currency comprehensive financial planning system that supports the CFP approved planning process for a variety of countries," said Greer. "As far as I know they remain the only such solution in the world today. PlanPlus was the obvious place to go to continue my association with Chinese, Spanish, and English speaking financial advisors across the globe."

"I believe that financial planning can play an instrumental role in many developing countries to help improve the lives of the growing middle class. I have long admired Shawn Brayman and the PlanPlus team for their leadership in promoting the value of financial planning globally and providing both tools and training to help advance the industry."

Greer will be co-located outside Los Angeles, CA in the US and in Beijing, China during the next several months while he works with PlanPlus to refine their Asia strategy in particular.

“PlanPlus recognized that success in the financial planning industry is not simply a matter of software, but processes and training as well,” said Greer. “Their award-winning web-based financial planning software program and Advice Transition Program resonate with a need recognized by advisors worldwide – how to move from products to advice in how they work with clients. I feel my background is a great fit - both for financial planning technology and advisor education. It’s a terrific opportunity to provide wealth management and planning solutions on a global basis - a real win-win situation.”

**About PlanPlus Inc.**

PlanPlus Inc. provides 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: [www.planplus.com](http://www.planplus.com)

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