

For Immediate Release – December 9<sup>th</sup>, 2004



**PlanPlus Inc.**



**Tech Platforms** of Cambridge, Ont. announced today the release of a new integration module that links their GoldMine CRM template for Financial Advisors with **PlanPlus Financial Planning Software**.

"Tech Platforms has developed one of the most popular templates in the market. It extends the power of GoldMine with specific fields of information that make the marketing and customer relationship management for financial advisors far more effective", said Cam Weir, President of Tech Platforms Inc. "The challenge for advisors is keeping the information up to date. Our integration module pulls the financial planning information from the PlanPlus Financial Planning Software into our product, FP4, so advisors always have a current customer profile for marketing purposes."

According to Shawn Brayman, President of PlanPlus Inc., "As a financial planning solution it is important for our software to have a complete view of the client – their assets, debts, insurance, budget, goals and more. The information that an advisor gathers as a part of the planning process is extremely powerful for marketing purposes. The integrated CRM solution from Tech Platforms, when combined with our electronic hooks to the back office plus the off-book data collected during the planning process, creates a tool advisors are desperate to have."

Page and Associates, a financial planning firm in Richmond Hill, Ont. was the first firm to go live with the integrated solution in their practice. According to John Page, President of Page and Associates "Over the years we have developed business processes that help to make us more efficient, but without integrated tools you are always fighting battles of time, effort and data integrity. The integration between PlanPlus and Tech Platforms' GoldMine template is something that escalates our process efficiency to a whole new level. It's something that every financial advisor would greatly benefit from having."

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

PlanPlus Inc. is a leading provider of wealth management solutions to financial services firms worldwide. Our approach is based on 15 years of experience in delivering personal financial planning and investment advisory tools.

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 telephone 705-324-8001 ext. 307

#### **About Tech Platforms.**

Tech Platforms is a leader in facilitating business development through technology. Tech Platforms assist business owners who are looking for a definite support plan to put in place for their technology infrastructure and to lower their overall support costs.

For further information about Tech Platforms, visit [www.techplatforms.com](http://www.techplatforms.com) or contact: Cameron Weir, President & CEO – [cameron.weir@techplatforms.com](mailto:cameron.weir@techplatforms.com) or telephone 519-584-2447 ext. 210