



PlanPlus Inc.

FOR IMMEDIATE RELEASE

Equinox Launches Web-Based Financial Needs Analysis Powered by PlanPlus Web Advisor™

TORONTO, ONTARIO (December 12, 2005) – Equinox Financial Services has launched a financial needs analysis tool for more than 3,500 insurance advisors in the Equinox network. Equinox Needs Analysis (ENA) is a web-based generic financial needs analysis tool, powered by the PlanPlus Web Advisor platform. ENA breaks new ground for Equinox advisors by integrating their advisor portal with this scalable web-based planning tool. The tool integrates directly with the suite of life insurance comparisons from AIG, Manulife Financial, Standard Life and RBC Insurance, all delivered by the Equinox ESP sales platform on the advisor's desktop computer.

“Equinox Needs Analysis is a great addition to the services we deliver to our network of independent MGAs and advisors,” says Daniel Dessureault, General Manager for Equinox. “We firmly believe in the value of an unbiased, user-friendly needs analysis to assist advisors in helping their clients, and the link to our product comparisons will help advisors match a need to a recommendation.

Tim Traill, Director of Technology Solutions, adds, “We are leading the way in the migration from desktop to web-based tools, while bridging the best of the traditional approach with the new online world. Advisors who login to our website can access ENA anytime/anywhere via the Internet, with no additional user names or passwords to remember.”

With Equinox Needs Analysis powered by PlanPlus Web Advisor, advisors can quickly gather and store client information and identify their financial needs. Upon completion of the ENA, the advisor can click on an Equinox insurance comparison tool to help select an appropriate insurance product. It launches the product tools on the computer desktop with all the client data and any identified gaps automatically loaded.

PlanPlus and Equinox will also offer advisors using ENA the option to upgrade their level of use to Bronze, Silver, and Gold levels of Web Advisor at discounted rates. The additional levels provide advisors with advanced financial planning capability, asset allocation and investment policy capabilities, integrated data from Cannex and other business applications.

According to Dessureault, “The introductory level of the Needs Analysis tool is easy to use so advisors can get up and running quickly, and it should satisfy the majority of client needs. Recognizing that not all advisors or their clients are alike, we will also provide the optional upgrades, for more in-depth analysis, at special prices for Equinox network members.”

“Traditionally many financial needs analysis packages delivered in the insurance market have been structured as sales concepts that lead into a specific product solution”, said Shawn Brayman, President of PlanPlus. “On the flip side, most financial planning packages do not integrate well or at all with tools the advisors use when they implement the insurance requirements outlined in the financial plan. We are very excited with what Equinox has done to allow advisors to scale from traditional FNA analysis up to our most comprehensive planning tools and remain integrated to their desktop product illustrations.”

To complement the rollout of the ENA tool, Equinox will work with PlanPlus to deliver special web-cast training sessions in both French and English for their advisors.

About PlanPlus Inc.

PlanPlus Inc. is a Canadian firm that provides wealth management and financial planning solutions based on their *PlanPlus Web Advisor* software to financial services firms worldwide. PlanPlus has users in North and South America, the Caribbean, Asia and Europe. Customers include banks, stock brokers/investment firms, insurance, credit union, mutual fund and financial planning firms.

As well as professional software solutions, *PlanPlus for Students* is an educational planning package used by colleges, universities and professional associations teaching financial planning principals and skills in Canada and internationally.

PlanPlus is a Canadian company established in 1990. It is privately owned and located in Lindsay, Ontario.

About Equinox Financial Services

Equinox Financial Services brings together financial product suppliers (including AIG Life of Canada, Standard Life, RBC Insurance and Manulife Financial) and member distributors (MGAs and Brokers) and provides added-value services to both groups. The independently-owned member distributors of Equinox make up a national network distributing a range of financial planning products and services. Equinox was established in 1991 and operates independently as a subsidiary of The Manufacturers Life Insurance Company.

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