



**PlanPlus Inc.**



FOR IMMEDIATE RELEASE

## PlanPlus DIME GIC Software On The Market

LINDSAY, ONTARIO - PlanPlus Inc. announced the general release of a new software program – PlanPlus DIME – designed to help deposit brokers and financial advisors manage their deposit taking business. The web-based software is fully integrated with the CANNEX Financial Network which provides interest rate information from all major financial institutions as well as the ability to effect the purchase of GICs and Term Deposits, electronically.

“The deposit taking business is difficult for advisors because they receive very little compensation, compared to other financial products, yet it remains one of the most paper-based and labour intensive businesses” said Shawn Brayman, President of PlanPlus.

Alex Melvin, President of CANNEX Financial Exchanges Limited, said "CANNEX provides PlanPlus DIME clients with daily summaries of current interest rate information for GICs, Term Deposits, GIAs, RRSPs and RRIFs. Instead of having to gather and compile this information manually, PlanPlus DIME clients now have 'Simply reliable data' from CANNEX at their fingertips."

In addition, PlanPlus DIME clients also have the ability to effect the purchase of GICs, Term Deposits and GIAs with 16 financial institutions, electronically, via CANNEX. In many cases, this eliminates the need for advisors to submit paper / fax applications / blotters to participating financial institutions as well as the need to handle the resulting confirmation information manually!

In speaking about processing efficiency, Frank Miemiec, Vice-President, Operations at Page Deposit Brokers Corp./Page and Associates Ltd. noted, "In our peak periods, we're handling over 80 maturities a day, and we're handling both the application and the back office functions. We needed a system that would allow us to clear these peak volumes efficiently through the entire process. DIME's web interface instantly shows our advisors the top 10 rates available for any deposit, with remaining deposit insurance per institution, and prints out a pre-filled application form after a few mouse clicks. Also, our back office is instantly up-to-date on all pending transactions, even those entered by remote advisors. As more financial institutions are able to receive applications, via CANNEX, our efficiency gains will increase even further."

John Page, President of Page Deposit Brokers Corp./Page and Associates Ltd. commented, "We have worked very closely with PlanPlus in developing the DIME software to ensure that it incorporated important time saving features. The efficiencies that we have created should allow us to double our business with the same staff. That of course has a very nice impact on our bottom line. "

The PlanPlus DIME system also has the ability to import mutual fund, stock and bond holdings information from many back office systems. When integrated with the GIC holdings information available from DIME this provides a total view of the client's managed accounts. PlanPlus Web Advisor, the web-based financial planning solution from PlanPlus, integrates with the same database allowing the customer's off-book or non-managed positions, personal use or business assets and liabilities to be recorded resulting in a truly comprehensive picture of the customer's net worth.

“Our forte at PlanPlus has always been our financial and investment planning software, the power of which is magnified with true integration to the back office data for a company”, said Shawn Brayman, President of PlanPlus. “We continuously ran into challenges where advisors had their client’s mutual fund information in the dealer back office but recorded the GIC business elsewhere. The opportunity to work with Page & Associates Ltd. provided us with an excellent opportunity to fill this need and improve our advisory tools at the same time.”

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