



PlanPlus Inc.



FOR IMMEDIATE RELEASE

SBB Mutual In Malaysia Selects Planplus Inc. Financial Planning Software

MALAYSIA - SBB Mutual Berhad, the 2nd largest unit trust management company in Malaysia (source: *Lipper as at 28/2/05*) has selected, customized and released PlanPlus Inc. PlanPlus Pro personal financial planning software for use by their financial planners and associate financial planners. PlanPlus is a Canadian company specializing in investment planning and financial planning software along with training for people in the financial planning profession. PlanPlus software is utilized in North and South America, the Caribbean, Asia and Europe.

SBB Mutual Berhad has retained PlanPlus Inc. to deliver a custom financial planning software version for their Certified Financial Planners, and investment planning and asset allocation tools for their Associate Financial Planners. Financial planning experts from PlanPlus in Canada will also provide both classroom and Internet based training programs for SBB investment representatives.

“Although financial planning is a relatively new profession in Malaysia compared to North America, the financial regulators in Malaysia have been much more aggressive in specifying who’s allowed to call themselves a financial planner, and what’s involved in financial planning”, said Shawn Brayman, President of PlanPlus Inc. “All of this has put a tough burden on companies to try and introduce financial planning because of their need to bring their advisory sales force up to very high level of expertise in a very short period of time. We are very excited to be working with SBB Mutual Berhad and pleased with the fact that they are introducing the highest levels of planning tools and professionalism to their sales force at such an early stage in the market. Their commitment to providing objective advice to their customers is to be commended”.

SBB Mutual Berhad has opened a Financial Care Centre, which is specifically designed to provide training and support services to their financial advisors and to ensure they deliver high quality planning advice to their customers.

“As one of the first unit trust companies in the country to be granted the Investment Advisor license to conduct financial planning services, we are committed in providing unbiased and independent financial advisory services to our clients. We shall continue to increase the awareness of financial planning to the public and to ensure that our planners are well trained and equipped with the tools and knowledge to perform their role as competent financial planners. PlanPlus is the strategic tool to assist the company in achieving our goal as your partner in financial planning.” said Mr Paul Low, chief executive officer of SBB Mutual Berhad.

“Establishing the Financial Care Centre as a strategic centre that is fully equipped with customized tools and cutting edge technology represents a quantum leap in SBB Mutual to provide value added services to its investors, and to transition SBB Mutual consultants from product selling to financial advisory services. There will certainly be many challenges ahead of us, however, by leveraging the expertise in financial services, structured processes, and strategic tools such as PlanPlus at FCC, we strive to set forth the company’s mission towards helping our clients achieve their financial goals built on a long term relationship of trust,” he added.



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About SBB Mutual Berhad

SBB Mutual Berhad, a member of the Southern Bank Berhad Group, is one of Malaysia's fastest growing unit trust management companies with a total approved fund size of 15.85 billion units. The company currently manages 25 funds and is also an Institutional Unit Trust Agent for the distribution of third party funds.

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.

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