



**PlanPlus Inc.**

## **SEVERAL MAJOR CREDIT UNIONS SWITCH TO PLANPLUS WEB ADVISOR**

**LINDSAY December 2006** Several major Canadian Credit Unions have recently adopted PlanPlus Web Advisor for their financial planning and advice solution.

"Because most credit unions attempt to provide a high level of service to all of their members and not just high net worth clients, they require a planning solution that allows them to deliver financial advice quickly and efficiently. PlanPlus Web Advisor does that" said Shawn Brayman, President of PlanPlus.

"PlanPlus impressed me right through the sales process" said Richard Stefansson, Wealth Manager for **South Interlake Credit Union**. "They took the time to address all of my questions and concerns. The integration of back offices into their software was a big win for us, our advisors can save a great deal of time downloading the account information directly into the software."

PlanPlus has always been a leader in the Canadian Credit Union marketplace with several dozen different credit union organizations using their software, but since the introduction of PlanPlus Web Advisor this trend accelerated.

"Our choosing and implementation of the PlanPlus Web Advisor software has been fairly seamless", advised Trevor Beaton, Manager of Wealth Services, at **Lloydminster Credit Union**. "PlanPlus took a great deal of time while I researched their offering and answered all of the questions that I had. They were very honest about both benefits and limitations. We worked closely to convert data from the desktop version we had used. The ability to download data directly to the software package has been a huge benefit. I would recommend this solution to other firms."

Many credit unions in Canada are licenced through Credential Securities for their mutual fund business. These firms use the Univeris software for their back office and can download customer and account information directly into the PlanPlus Web Advisor, saving them a huge amount of time in preparing and reviewing financial plans and investment policy statements.

"As **Common Wealth Credit Union** established it's new Wealth Management subsidiary, Common Quest Financial, it was imperative that the clients who were being served received the most effective, comprehensive and simple solutions. PlanPlus software encompasses all of these characteristics and in doing so, allows the Common Quest team to focus on developing trustworthy relationships with our clients" said The Team at Common Quest Financial.

"PlanPlus Web Advisor is a comprehensive financial planning program with impressive professional documents, excellent step by step training modules, and a qualified and responsive support system." said Stewart Duckworth of the **Education Credit Union**. "Education Credit Union has been using the PlanPlus program for over a decade. We are impressed with the constant upgrades and continued enhancements. We proudly endorse PlanPlus Web Advisor as a comprehensive financial planning tool."

### **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.

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