



PlanPlus Inc.

FOR IMMEDIATE RELEASE

PlanPlus and Croesus Finansoft Announce Integrated Solution

MONTREAL, January 10, 2006 – Croesus Finansoft, Canada's number one CRM and Portfolio Management Software developer, announced the execution of an agreement to market to their customers a version of the PlanPlus Web Advisor that is fully integrated to their newly released version 6 Croesus Portfolio Management software.

National Bank Financial (NBF), which is a common customer of Croesus Finansoft and PlanPlus Inc., will be the first financial institution that will benefit from this integration. Nearly 2,000 investment professionals and their assistants at National Bank Financial currently access Croesus using an ASP model with the solution hosted at an IBM data center and managed by Croesus. NBF also provides their investment advisors with a customized version of PlanPlus Web Advisor, which is branded Copernicus internally.

"We're very excited about this integration. From National Bank Financial's perspective, it will make the planning process easier and less time-consuming – which should translate into more Investment Advisors doing more plans for more clients. Everybody wins, and our advisors strengthen their relationships with their clients", said Gordon Gibson, Senior Vice President and Managing Director, National Bank Financial.

The major advantage of this integration is the fact that an advisor will no longer need to rekey information between their CRM & Portfolio Management Software (Croesus) and their Financial Planning Software (PlanPlus Web Advisor). Croesus Finansoft and PlanPlus are now offering a new, fully integrated solution to the financial services industry that automatically updates all of the customer's portfolio information with minimal effort by the investment advisor.

According to Shawn Brayman, President of PlanPlus Inc. "The gain in operational efficiency will be tremendous for the users considering that advisors are busy and don't have the time to deal with re-entering so much data that already exists in their other systems. The integration between our PlanPlus Web Advisor solution and the Croesus Portfolio Management software allows an average IA to do more robust planning in a fraction of the time."

Rémy Therrien, President of Croesus Finansoft said, "PlanPlus and Croesus Finansoft are both leaders in their respective niches. Providing an integrated platform to our common clients was the next logical step to answer our client needs. We are proud that NBF is the main sponsor and the first client benefiting from this integrated platform."

In addition to National Bank Financial, many of the customers serviced by the National Bank Correspondent Network (NBCN) are also users of the Croesus solution. NBCN was a co-sponsor of the integration project. NBCN, PlanPlus and Croesus anticipate the integrated solution will have broad appeal to firms that are looking for mechanisms to allow their investment advisors to introduce more effective forms of Investment Policy and Financial Planning advice for their customers.

About Croesus Finansoft

Croesus Finansoft has been building on a tradition of creating wealth since 1986. Worldwide leader, the company was founded with the objective of introducing a specialized financial solution in the field of securities and portfolio management. It also offers financial solutions to banking, brokerage and insurance firms. At the leading edge of technology, the company has garnered a reputed clientele (National Bank Financial, Desjardins Securities, TD Waterhouse, UBS, CIBC – Merrill Lynch, HSBC, Dundee Securities, Laurentian Bank Securities, Richardson Partners Financial Limited) and thousands of Croesus users across the world.

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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