



**PlanPlus Inc.**



FOR IMMEDIATE RELEASE

## **Rice Financial Releases PlanPlus Web Advisor**

**WINNIPEG, MANITOBA March, 2006** Rice Financial announced the release of Plan Plus Web Advisor for investment planning and financial planning services delivered by Rice Financial representatives. The system has been fully integrated to Rice Financial's CENTRAC system, a proprietary back office and CRM solution.

"Rice Financial decided to integrate and adopt PlanPlus Web Advisor because of its superior financial planning capabilities and the ease with which we could integrate it to our existing CENTRAC system", said Fred Wing, Executive Vice President of Rice Financial. "Rice Financial services over 85,000 clients in Ontario and Western Canada through both branch and independent channels. We wanted a solution that would allow us to provide quality investment planning and financial planning services quickly and easily, and lever our existing technologies."

"CENTRAC is a strategic technology solution for us that allows our representatives a consolidated view and management of clients, their GICs, mutual funds and other investments as well as their insurance products", said James MacPherson, VP of Information Technology at Rice Financial. "Using the PlanPlus web services interface we were able to integrate the solutions in a matter of weeks, so when an advisor accesses PlanPlus Web Advisor to provide advice to a client all the basic customer information, accounts, investments and insurance we manage in CENTRAC are transferred and updated in Web Advisor automatically. This is a major time saver for our reps."

"Working with Rice Financial has been a great experience for us since they have two very different channels – a wholly owned branch network, as well as a channel of independent representatives that provide services in many smaller communities", said Shawn Brayman, President of PlanPlus. "When they gave the go ahead in November the schedule was tight to develop, test and deploy a fully integrated version of Web Advisor for the New Year. Between our existing web services model and the flexibility of their in-house system the project went surprisingly easily."

"Rice Financial representatives will be using PlanPlus Web Advisor to deliver customized Investment Policy Statements for clients, as well as more comprehensive financial plans", said Dale Hrycaiko, Manager of Special Services at Rice Financial. "We felt it was important for our advisors to have access to an integrated planning tool to service our clients at a level that would meet or surpass the new Practice Standards that come into effect through the Financial Planning Standard Council of Canada this April."

### **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.

Website: <http://www.planplus.com>

## **About Rice Financial**

Rice Financial is committed to helping Canadians achieve financial security and peace of mind at every stage of life. A network of branch and associate offices stretches from the BC coast to the Ontario/Quebec border, serving more than 85,000 clients and administering assets in excess of \$3.8 billion. *Rice Financial is a member of the Jovian Capital group of companies.*

Website: <http://www.ricefinancial.com>

### **PlanPlus Inc.**

Elaine Hartjes  
Marketing  
Email: [elaine@planplus.com](mailto:elaine@planplus.com)  
Phone: 705-324-8001 ext. 307

### **Rice Financial**

Dale Hrycaiko  
Director, Risk Products  
Email: [dhrycaiko@ricefinancial.com](mailto:dhrycaiko@ricefinancial.com)  
Phone: 204-788-4040 ext. 350