



**PlanPlus Inc.**



**FOR IMMEDIATE RELEASE**

## **South Interlake Credit Union Selects PlanPlus Web Advisor**

**MANITOBA April, 2006** South Interlake Credit Union has chosen PlanPlus Web Advisor for use by its advisors. South Interlake Credit Union has several branches throughout Manitoba, and it was important for their advisors to have a point of access from a variety of locations.

After an extensive evaluation of several financial planning solutions, South Interlake Credit Union found Web Advisor best suited their needs due to its ease of use and comprehensive detail.

South Interlake Credit union was looking for a solution with the flexibility to customize a plan for each member, with the integration of the data accessed from their back office via internet directly into the member plans. This streamlines the planning process and the system automatically updates the values of those assets on a daily basis.

"South Interlake Credit Union is the ideal type of firm we have designed Web Advisor to service, an organization committed to providing quality financial advice cost-effectively to everyday Canadians" 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."

### **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 South Interlake Credit Union**

Throughout the years, South Interlake Credit Union has been a leader of change and innovation in the financial services industry. As a leader, SICU has taken the initiative to be different from other financial institutions and to apply change to tradition through innovative branch buildings, ATM technology, staff education and much more. SICU's key differentiating factor is the superior service provided for SICU members on an everyday basis in all aspects of the organization.

Website: <http://www.sicu.mb.ca>

### **PlanPlus Inc.**

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