



Integration overview

By integrating Iress’ financial advice platform Xplan with Practifi, you’ll experience a seamless flow of data between the two systems, keeping your clients in sync, along with their most critical financial information. Experience a unified view, unlock business efficiency and spend more time creating the best strategies for your valued clients.

You can find additional information in our Knowledge Base [here](#) by searching for “Xplan”. Alternatively, reach out to your Client Success Manager or [contact us](#) to learn more.

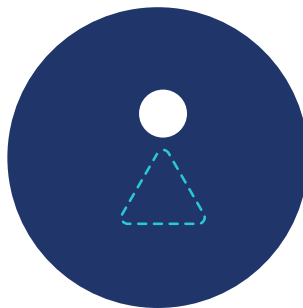


Benefits for you



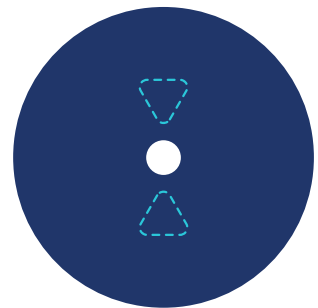
Efficiency

Reduce error and eliminate the task of manually updating asset and holding balances between systems.



Strategy

Free up your time and use it to grow your client relationships and improve your advice strategies.



Unified View

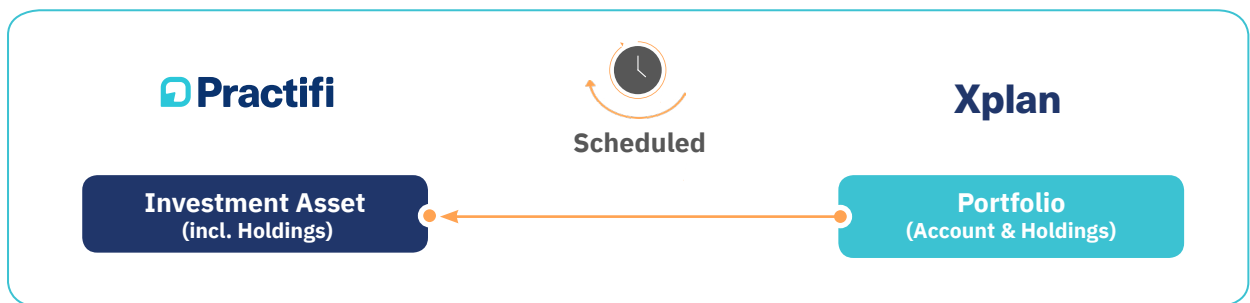
Unify the client record within Practifi and view all of your clients’ portfolio positions at a glance.



Data mapping & syncing

1. One-Way Sync

The below record is synced from Xplan to Practifi only; no changes can be made to this record in Practifi. Records can be synced according to a desired schedule.

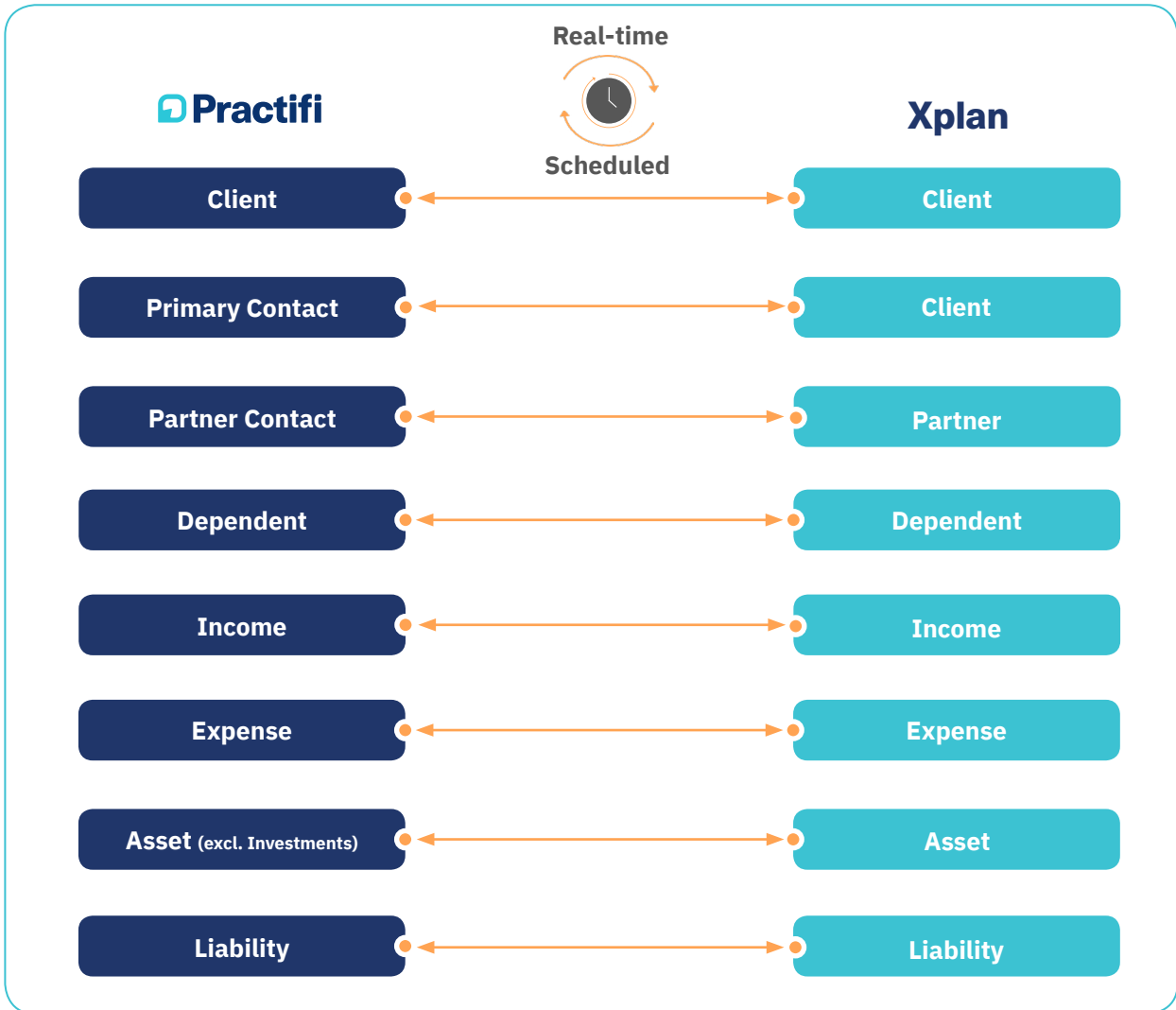




Data mapping & syncing

2. Two-Way Sync

Records are sent to and received from Xplan at the client level. The below records are synced from Practifi to Xplan in real-time, and on a scheduled basis in the other direction. The sync schedule is set based on the amount of data shared between the two systems.



Coming soon



Insurance



Superannuation



Goals & Objectives

