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Asgard steps up plans to develop next-generation software

Asgard Wealth Solutions has intensified its campaign to develop an integrated planning and practice management software package for advisers, aiming to start rolling out a new, state-of-the-art solution to planners in the last quarter of 2006.

On a practical level, the project will see the company integrate its platform software (adviserNET), with its financial planning software, (ASSIRT Software), as well as roll relationship management, workflow, and portfolio planning tools, into one total business solution.

“After much research and development, our project to integrate and upgrade our current software offering for advisers has now entered the implementation phase,” CEO Geoff Lloyd said.

“We know that in order for advisers to deliver quality advice and run profitable, efficient practices they need the right software. Our aim with this project is to give planners, literally at their fingertips, all the computer based tools they need to do their jobs effectively.

“We plan for our new integrated solution to be of the next-generation – advice-centric, user-friendly, and complete in its ability to give planners full software support.”

Mr Lloyd said the views of many advisers had been canvassed to help design the blueprint for the new package.

“Armed with this research, we are now committed to making a significant investment to the project while continuing to work with advisers to make sure we get it right.”

Mr Lloyd said the company had a proven track record of delivering award-winning software solutions for planners, with adviserNET most recently voted the ‘number one online service for financial advisers by research house Investment Trends* for the third consecutive year.

He said ASSIRT Software, which was developed in 1985 making it the industry’s most enduring financial planning software package, was also one of the most widely used, with more than 1200 users.

“We are confident we can build on this solid foundation and deliver a next-generation software solution for advisers that will rival the best in the market.

“Our core strategy is to ‘enable advice’ and we will do this by giving planners the full range of products and services to help them deliver quality advice to investors, and in this way grow profitable practices. This project is another step forward in our bid to achieve this goal,” Mr Lloyd said.

*Investment Trends 2005 Competitive Analysis Report: Investment Platforms

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