

Schroders

Schroders to export investor data to Xplan

Schroders has initiated a project to provide Xplan, the web based administration system for advisers, with investor data on a daily basis. Investor data includes unit holdings, details of applications, redemptions and distributions. On completion of the project later this year, advisers using Xplan will be able to access details of their clients holdings in Schroder funds more readily. Investor privacy is paramount to the project which includes rigorous controls to ensure data security.