NEWS

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Buckingham Strategic Wealth Chooses Holistiplan's Award-Winning Tax-Planning Software

Multi-year agreement will provide critical insight into clients' tax circumstances, provide deeper financial planning experience

COLLEGE STATION, TX [March 3, 2021] – Holistiplan co-founders, Roger Pine, CFA®, CFP®, and Kevin Lozer, CFP®, today announced that Buckingham Strategic Wealth, headquartered in St. Louis, Missouri, has added Holistiplan's tax planning software to its tech stack. Holistiplan is an award-winning tax planning software for financial advisors, built to systematize and automate the process of reviewing a client's tax return to find potential planning opportunities. The multi-year agreement with Holistiplan will provide Buckingham advisors critical insight into their clients' tax circumstances in order to provide a deeper financial planning experience.

"We are thrilled to be working with Buckingham Strategic Wealth to deliver efficient and scalable tax planning to their clients," said Holistiplan co-founder Kevin Lozer. "As a fee-only financial planner for a decade prior to launching Holistiplan, I have respected Buckingham for years. Their evidence-based investment approach and focus on financial planning resonated with me as an advisor. When the opportunity arose to deliver Holistiplan to their advisors, I knew it would be a great match. Working with the Buckingham team to finalize this agreement confirmed that their great reputation is well-earned. We are honored to become their tax planning software provider as they continue helping more families achieve their most important goals."

"We've been exploring Holistiplan's benefits for years, with an eye towards implementing the best integrated tax solutions for our clients and advisors," said Rob Ziliak, Chief Experience Officer at Buckingham Wealth Partners. "Forward-looking tax strategies, short- and long-term, are critical parts of financial and investment plans. Holistiplan will empower Buckingham advisors and allow them to enhance their proactive tax planning resources."

Susan Strasbaugh, a wealth advisor at Buckingham Strategic Wealth, appreciates the intuitive nature of Holistiplan and the time it saves when working through tax strategies with her clients. "Whether I'm working with existing relationships or with prospective clients, Holistiplan's reporting capability allows me to demonstrate line-of-site into their particular tax situation, differentiating the comprehensive wealth management approach at Buckingham from firms that strictly manage assets."

"With Holistiplan, advisors can focus more on advising their clients, not inputting data and crunching numbers the old-fashioned way," Ziliak added.

ORIGINS OF HOLISTIPLAN

Holistiplan was created and designed by two CFP® professionals. Being firm owners themselves, they were constantly looking for ways to efficiently and consistently provide their financial planning service to clients. As engaged volunteers for the National Association of Personal Financial Advisors (NAPFA), they also spoke to many other firm owners that had similar concerns. After identifying this industrywide need, they designed this software using the latest technological advances to read uploaded tax returns and generate client-ready reports (with the subscribing financial planning firm's logo) that provide planning opportunities.

After reviewing the report, the advisor can use the 2018, 2019, or 2020 tax data to run various tax scenarios for the next year and beyond. Earlier this year, Holistiplan introduced a new feature called "Tax Prep Letter" that allows advisors to efficiently and accurately create a personalized letter that will highlight all their clients' tax planning items from 2020.

ABOUT HOLISTIPLAN

Holistiplan is an award-winning tax planning software for advisors built to systematize and automate the process of reviewing a client's tax return to find potential planning opportunities. Holistiplan was created and designed by co-founders, Roger Pine, CFA®, CFP®, and Kevin Lozer, CFP®, who designed this software to accomplish what have historically been two competing goals in the financial services profession: Make the financial planning process faster for advisors, while making it better for every client. Their award-winning solution uses optical character recognition (OCR) to read uploaded tax returns and generate client-ready reports that uncover potential financial planning opportunities through an algorithmic program. The financial professional can then run various scenarios to determine various future outcomes. Both Pine and Lozer were financial advisors in independent advisory firms prior to starting Holistiplan, which gives them insight into what advisors need. Learn more at holistiplan.com.

ABOUT BUCKINGHAM STRATEGIC WEALTH

Buckingham Strategic Wealth, LLC helps individuals, families, businesses, trusts, nonprofits, retirement plans and medical practice owners achieve their most important life and financial goals by creating customized, comprehensive, evidence-based financial plans. Buckingham's investment philosophy is rooted in an academic approach tailored to address each client's willingness and ability to accept market risk. As a registered investment adviser, Buckingham has a fiduciary obligation to its clients. Buckingham's investment approach centers on modern portfolio theory implemented through passively managed mutual funds and the firm's fixed income portfolio design and execution capabilities. Headquartered in St. Louis, Buckingham has 42 offices in 22 states. For more information about Buckingham, visit www.BuckinghamSW.com.

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