NEWS

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Holistiplan and Wealthbox Streamline the Process of Analyzing Tax Returns and Proving Value to Clients

Financial advisors can now seamlessly incorporate automatically-generated tax planning information

College Station, TX [August 11, 2020] - Holistplan, 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, today announced a new partnership with Wealthbox®, a popular CRM that helps financial advisors better manage client relationships.

"This partnership with Wealthbox supports our goal of helping advisors deliver richer financial planning to more clients," said Roger Pine, CFP®, CFA, Co-Founder of Holistiplan. "Now, advisors on the Wealthbox platform can seamlessly incorporate automatically-generated tax planning information from Holistiplan. We think it will be a game changer for advisor efficiency, and we are grateful for the Wealthbox team's support in making it happen."

Through this new integration, financial advisors can send household information to Holistiplan to avoid dual data entry. Information such as household members and birth dates can be imported to Holistiplan. Then, once Holistiplan runs its analysis on a tax return, key figures and the system-generated observations can be dropped back into Wealthbox as a note.

"Holistiplan's unique and innovative tax planning software is a fantastic fit in integrating with Wealthbox CRM for our mutual customers," said John Rourke, Wealthbox CEO. "We're delighted to have Holistiplan join the growing Wealthbox ecosystem of leading wealth-tech vendors to help advisors help their clients."

WEBINAR SCHEDULED FOR AUGUST 18 AT 2PM ET

Interested advisors and journalists are invited to register for a live webinar on August 18, 2020 at 2pm ET to learn more about the integration of Holistiplan and Wealthbox and how they can automate the process of reviewing a client's tax return to find potential planning opportunities.

It is free to attend but seats are limited. This registration link will allow the interested party to attend live and to also receive the recording:

https://us02web.zoom.us/webinar/register/7015960532048/WN_CfBiwnzHSkScjl3WMcGucw

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 outcomes. Learn more at holistiplan.com.

ABOUT WEALTHBOX

Wealthbox® is a web-and-mobile CRM application for financial professionals. Integrated with leading broker/dealers and wealth-tech partners, Wealthbox is known for its modern product design that results in a powerful yet simple user-experience for independent advisory firms of all sizes. Learn more at wealthbox.com

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