

NEWS

FOR IMMEDIATE RELEASE

Media Contacts:

Leesy Palmer or Marie Swift
Impact Communications, Inc.
913-649-5009

ImpactMediaManager@ImpactCommunications.org



TEXAS TECH UNIVERSITY
College of Human Sciences

School of Financial Planning™

Holistiplan Collaborates with Texas Tech School of Financial Planning

TTU students to receive free access to premier tax planning tools

COLLEGE STATION, TX [March 8, 2022] – [Holistiplan](#) today announced a collaboration with [Texas Tech School of Financial Planning](#) (TTU) which allows students complimentary access to Holistiplan as part of their financial planning curriculum. 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 collaboration with TTU provides students access to tax planning tools as a valuable addition to both their education and preparation for the future.

“We are thrilled to be working with Texas Tech School of Financial Planning to provide a vital teaching tool to their students,” said Holistiplan co-founder Roger Pine. “Texas Tech’s financial planning program is highly respected and regarded as one of the best in the country. Certified Financial Planner Board-Registered programs such as theirs have licenses with best-in-class fintech products like eMoney and MoneyGuidePro. When the opportunity arose to provide Holistiplan as an additional teaching tool for their students, we knew it would be a great match. We are honored to collaborate with their program and further our mission of helping advisors, and in this case future advisors, provide richer tax planning for more clients.”

Holistiplan is currently in discussion with other universities, and the agreement with TTU will be the first of many future collaborations Holistiplan hopes to secure as they seek to support the next generation of financial planning talent by providing Holistiplan’s award-winning software as a teaching tool for university students.

“My firm has been using Holistiplan and I have seen what a powerful tool it can be,” said John Salter, CFP®, Professor of Practice at Texas Tech and Partner at Evensky & Katz/Foldes Wealth Management. “As an educator, I feel it’s a huge value to get this tool in the hands of our financial planning students. They already have access to some of the best fintech in the county. Adding Holistiplan to their toolbox is a natural fit alongside those other great fintech tools.”

Students will ultimately use Holistiplan in multiple courses including the Technology, Tax, and Capstone courses. Students who become proficient in the software will also be able to list they are “Holistiplan Certified” on their resumes.

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 TEXAS TECH SCHOOL OF FINANCIAL PLANNING

Texas Tech's nationally renowned School of Financial Planning offers a bachelor's degree, minor, master's degree, and a doctoral degree in financial planning. The Financial Planning major evolved from the Family Finance major and has been in place at Texas Tech for thirty-five years. Established by leaders with a vision of the need to educate the next generation of financial planners, the Financial Planning major has become a highly marketable program that has met the standards for registration established by Certified Financial Planner Board of Standards, Inc (CFP Board). For more information about Texas Tech School of Financial Planning, visit www.depts.ttu.edu/hs/pfp/.

###