

NEWS

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Holistiplan Partners with Redtail Technology to Streamline the Process of Analyzing Tax Returns

*Financial advisors can now prove value to clients by
seamlessly incorporating automatically-generated tax
planning information*

College Station, TX [October 28, 2020] - [Holistiplan](#), 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 [Redtail Technology](#), the leading provider of client relationship management (CRM) solutions for financial advisors.

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 Redtail as a note.

"We are thrilled to integrate with the market leader in advisor CRM. Our number one priority is advisor efficiency, and this integration will allow Holistiplan members to seamlessly pull their household information from Redtail into Holistiplan, further reducing data entry," said Kevin Lozer, CFP® and co-founder of Holistiplan. "Holistiplan will also send tax data and our planning observations to Redtail, helping advisors retain client information without entering it themselves.

We believe this is a game changer for advisor efficiency, and we are grateful for the Redtail team's support in making it happen.”

“Redtail is dedicated to continue streamlining advisors' workflows by integrating with leading industry platforms,” said Brian McLaughlin, Redtail CEO. “We are greatly looking forward to working with Holistiplan and bringing their innovative tax planning software to advisors nationwide to further improve their day-to-day processes.”

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 REDTAIL TECHNOLOGY

Founded in 2003, Redtail Technology is a leading provider of web-based Client Relationship Management (CRM), compliant text messaging solutions (Redtail Speak), paperless office, and email archiving solutions in the financial services industry. The company is dedicated to helping advisors efficiently grow their firms by providing them with the core technologies that drive their day-to-day operations, offering low cost and easy to implement applications and integrating with many of the industry's most widely used applications. As a pioneer in the financial technology industry, Redtail is committed to providing advisors exceptional customer service and strives to contribute in meaningful ways to its local communities in California, Arizona, and Georgia. For more information, visit redtailtechnology.com.

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