

# NEWS

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## Holistiplan Partners with SEI to Provide Tax Planning for 7,500 Financial Advisors

*Award-winning tax planning technology gives financial professionals the opportunity to help more families nationwide*

COLLEGE STATION, TX [July 7, 2022] – [Holistiplan](#), 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, today announced a strategic partnership with [SEI’s advisor business](#), which delivers technology and investment solutions that provide a unified, digital wealth management experience for independent financial advisors and their clients. The strategic partnership provides SEI’s 7,500 advisors access to the Holistiplan platform.

### Access to tax planning software for SEI’s 7,500 independent advisors.

“Working with SEI and their advisors furthers our mission of helping more advisors leverage the power of technology to help more families,” said Kevin Lozer, CFP®, President/Co-Founder. “It’s a partnership we’re very excited to be able to officially announce and one we expect will be fruitful and mutually beneficial for years to come. Regardless of whether or not advisors are new to tax planning or they’re tax planning experts, this integration will allow them to provide tax planning to all of their clients quickly, uniformly, and efficiently, and help them to see better business outcomes for their practice.”

“We are excited to partner with SEI and the more than 7,500 advisors they work with across the country,” said Roger Pine, CFA®, CEO/Co-Founder. “SEI does a great job of ensuring their advisors have access to the technology solutions they need to be successful, and we’re honored to be included in that group. We believe comprehensive planning includes tax planning, and we’re grateful SEI has chosen Holistiplan as the best tool to help their advisors do that tax planning.”

“We are thrilled to partner with Holistiplan and extend the opportunity for our community to continue to expand the life-changing value they provide investors. Today’s advisor is expected to specialize in services that span the spectrum of financial advice, and Holistiplan’s ability to scale the process of tax planning so advisors can become both more comprehensive and efficient is in perfect alignment with our mission—helping advisors power investors to achieve and sustain

financial freedom,” said Erich Holland, Executive Managing Director of Client Engagement for SEI’s Advisor business.

Since launching in summer of 2019, Holistiplan has added over 10,000 users from across the country. Founders Lozer and Pine attribute their rapid growth and profitability to the loyalty and valuable feedback from their advisor community of subscribers. Holistiplan has already been voted the #1 tax planning software for advisors in both the 2022 and [2021 T3/Inside Information Software Survey reports](#) and the [2021 Kitces Research Technology Study](#).

## **ABOUT HOLISTIPLAN**

Holistiplan is an award-winning tax planning software for financial planners and investment advisors built to systematize and automate the process of reviewing a client’s tax return to find potential planning opportunities. Holistiplan was created by co-founders, Roger Pine, CFA<sup>®</sup>, CFP<sup>®</sup>, and Kevin Lozer, CFP<sup>®</sup>, 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. Holistiplan 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. Financial professionals can then run various scenarios to determine future outcomes. Both Pine and Lozer were financial advisors in independent financial advisory firms prior to starting Holistiplan, which gives them keen insight into what advisors need. Learn more at [holistiplan.com](https://holistiplan.com).

## **ABOUT SEI**

SEI (NASDAQ:SEIC) delivers technology and investment solutions that connect the financial services industry. With capabilities across investment processing, operations, and asset management, SEI works with corporations, financial institutions and professionals, and ultra-high-net-worth families to solve problems, manage change and help protect assets—for growth today and in the future. As of March 31, 2022, SEI manages, advises, or administers approximately \$1.3 trillion in assets. Learn more at [seic.com](https://seic.com).

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