NEWS
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Holistiplan Partners with University CFP® Programs to Provide Technology to Financial Planning Students

Award-winning software part of offerings for capstone and tax courses

COLLEGE STATION, TX [February 21, 2023] – Holistiplan, the industry-leading tax planning software for financial advisors, today announced a partnership with six major universities offering real world learning to hundreds of students currently in CFP® programs. As part of the Capstone, Tax Planning, and Software financial planning courses at Texas Tech University, Texas A&M University, University of Georgia, Western Michigan University, Brigham Young University-Idaho, and Kansas State University, students now have free access to the fintech company's award-winning software. In addition, Holistiplan is also offering a certification course to help boost student training and resumes.

TAX PLANNING SOFTWARE FOR TOMORROW'S FINANCIAL ADVISOR

Holistiplan Student Edition, a custom-built version of the software available at no cost for any student currently in a CFP® course, is designed to allow students and their professors to collaborate on real world examples within Holistiplan. Professors can upload specific sample tax returns for their students, who in turn can use Holistiplan's full set of tax planning features to get real world experience with what financial planners can do for their clients. The program offers centralized management for professors and program sponsors, so they can give a more guided and curated experience within the software, with minimal overhead for the professors themselves. In addition, students may work through a purpose-built course of study to become Holistiplan Certified. This certification is attainable by going through a series of tutorials, followed by short quizzes to test knowledge of the basic programs. Anyone who completes the program also receives a certificate.

"Holistiplan's software allows our students the ability to apply what they have learned in the classroom to real-world scenarios, giving them a competitive edge as they enter the workforce as financial planners," said Nathan Harness, Ph.D., CFP®, Director of Financial Planning at Texas A&M University. "This software not only helps students understand the technical aspects of tax planning, but it also allows them to see the bigger picture and gain a comprehensive understanding of the tax domain."

"It's been stunning to see the incredible growth in financial planning academic programs over the last few years. Holistiplan is committed to doing everything we can to help these students enter the profession fully equipped to start serving clients in meaningful ways. We've made this investment in our product because we want to support the professors and staff making this a reality," said Roger Pine, CFA, CFP®, CEO and Co-Founder of Holistiplan. "Our goal with this work was to give academic program sponsors the most seamless experience possible when getting their students up to speed with Holistiplan. Our partners in academia have been invaluable supporters since the earliest days of our company, so this version of Holistiplan built just for them is a sign of our commitment to their success and that of their students."

"We are always looking for opportunities for our students to improve their knowledge of cutting-edge financial planning software. Allowing students the opportunity to use Holistiplan improves the quality of their education and allows them to be better prepared as they graduate and begin providing clients with comprehensive financial planning," said Ben Jacobs, M.S., CFP®, a part-time instructor at the University of Georgia. "My firm is one of the early adopters of Holistiplan and I have been amazed at the features and resources that have been added over time. I'm excited for our students to have the opportunity to use such a powerful tool."

Any student or faculty member at any university CFP® program can request free access and support to this new program by emailing futureplanners@holistiplan.com.

AWARD-WINNING SOFTWARE ATTRIBUTES GROWTH TO ADVISOR FEEDBACK

Since launching in July 2019, Holistiplan has added over 15,000 users from across the country. Co-founders Kevin Lozer and Roger Pine attribute their rapid growth 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 2021 and 2022 T3/Inside Information Software Survey reports, and the 2021 Kitces Research Technology Study. The software also plays well with others and scores the highest out of nine other companies in the Ezra Group WealthTech Integration Score.

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®, 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. 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 www.holistiplan.com.

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