NEWS

holistiplan

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Holistiplan Recognized as Top-Ranked Tax Planning Solution in Financial Advisor Survey

*T3/Inside Information Software Report Says
Intuitive Tax Planning Software is #1 with Financial Pros Again*

COLLEGE STATION, TX [May 3, 2022] – Holistiplan, an award-winning technology solution for financial professionals, today announced their #1 top ranking in the 2022 T3/Inside Information Software Survey report. The results of this much-anticipated survey were presented live at the T3 Technology Conference in Denton, TX. In their category, Holistiplan had the biggest market share, the highest satisfaction rating, and the highest number of financial professionals considering it. This is the third time, in both the T3/Inside Information Software Survey and the Kitces Research Technology Study, Holistiplan has been ranked #1 in as many years of being in business.

HOLISTIPLAN NAMED CATEGORY LEADER WITH STUNNING SCORES

The 2022 T3/Inside Information Software Survey report is now available at www.T3TechnologyHub.com. This 72-page report is the product of months of data analysis by Bob Veres of *Inside Information* and Joel Bruckenstein of T3. With more than 4495 respondents, this is the broadest report on this important topic in the financial planning profession.

"Have we ever seen a fintech solution rocket up to a dominant position in its category as rapidly as Holistiplan?," asked Veres rhetorically in the report. "Last year," he continued, "the tax planning product was launched and immediately acquired twice the market share of its established competitor and the lead has been widening ever since. Users like the program's OCR (Optical Character Recognition) capabilities, which scan a client's tax return and fill in the required fields for tax modeling. A year after the 2021 survey, its 8.93 rating is among the highest in the entire survey."

Satisfaction scores over 8.0 should be considered remarkable according to the survey authors. Out of more than 800 software products reviewed in the report, Holistiplan's user rating places it in the top 1% across all industry software solutions. "Holstiplan is also the runaway leader in the yellow box list of programs that respondents are considering," said Veres.

"We were ecstatic to see the T3/Inside Information Tech Survey results. Well before we started Holistiplan, I used the T3/Inside Information Tech Survey to help shape the technology decisions we were making in our financial planning firm," said Kevin Lozer, CFP®, President and Co-

Founder of Holistiplan. "The survey has been a valuable resource to me, as an advisor, seeking ways to run an efficient and client-focused firm. To now see the software company we created become a market leader in both Market Share and in User Rating is so exciting. Thank you to Joel and Bob for continuing to produce a tremendously valuable business tool for advisors. Thank you to our advisor community for your continued support and thank you to all my Holistiplan team members for working so hard to produce these stellar results."

A NEED FOR INTUITIVE TAX PLANNING SOFTWARE

"It's incredibly encouraging to see how quickly the total adoption of tax planning software has grown in our industry," said Roger Pine, CFA®, CFP®, CEO and Co-Founder of Holistiplan. "Based on our own experiences as advisors, we knew an intuitive tax planning software could make a huge impact, and now thousands of advisors are validating that view."

"In fact, the 2019 T3/Inside Information Tech Survey showed just a 7% share across all tax planning products, so it's clear that in just three short years, tax planning software has moved from being a fringe product for a few advisors to a necessary component of every advisor's tech stack. We're thrilled to be the top tax planning software of choice as more advisors choose richer financial planning for all their clients," said Pine.

Holistiplan is at the T3 Technology Conference from May 2-4, 2022, with a booth in the Exhibit Hall. Attendees are encouraged to stop by during breaks to speak directly with team leadership about this game-changing software.

HOLISTIPLAN ANNOUNCES 10,000 USERS

Since launching less than three years ago, Holistiplan has added 10,000 advisor users from across the country to their tax software platform. Lozer and Pine attribute their rapid growth and profitability to the loyalty and valuable feedback from their advisor community. To celebrate this milestone, Holistiplan launched a new two-part public service initiative: part one is to serve advisors assisting pro bono clients, and part two is to provide 10,000 meals to No Kid Hungry. Read more here: [Holistiplan Hits 10,000 Users on Award-Winning Tax Software](#).

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](#).

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