

NEWS

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Holistiplan’s Innovative Tax-Planning Software is Latest Value-add to Carson’s Tech Stack

*Firm established by Barron’s Top Advisor Ron Carson has
rolled out Holistiplan for strategic tax planning*

COLLEGE STATION, TX [October 20, 2020] – [Holistiplan](#) co-founders, Roger Pine, CFA[®], CFP[®], and Kevin Lozer, CFP[®], today announced that [Carson Group](#) will integrate Holistiplan’s award-winning comprehensive tax planning software into its tech stack. The Holistiplan subscription costs are covered in full for all Carson Partners. Earlier this year, Holistiplan launched with a select group of Carson Wealth private clients to unveil tax planning opportunities. Now, it is available for all advisors in the Carson Partners network. Erin Wood CFP[®], CRPC[®], FBS[®], Senior Vice President of Financial Planning and Advanced Solutions at Carson Group, has been working with Carson Partners in 36 states to make the software accessible and the resulting planning opportunities available to the families these advisors serve.

“Holistiplan is a fantastic value add to the client experience that doesn’t add any cost to the client – or to our firm,” said Joel Worsfold, Managing Director of Carson Wealth in West Des Moines, Iowa. “With a growing client roster, today’s advisor deals with all levels of wealth and needs a tool that can accommodate the needs of many rather than complex software tailored only to the largest clients.”

Carson Partners like Worsfold and others have already seen the benefits of efficiency through Holistiplan. The tax return supplies the needed baseline of client income and assets, which cuts down on data entry and paperwork. Then the advisor has the necessary information, right at hand, to run their planning scenarios. “It just makes all of our Roth Conversion conversations so much easier,” said Dan Adams, Partner and Wealth Advisor at Latitude Wealth Management. “We can talk about the guardrails, like Medicare premium surcharges, tax brackets or penalties.”

“No matter what happens as we continue to navigate the novel Coronavirus pandemic, the U.S. election results and the multitude of other external factors that put pressure on the markets, taxes will be due this year, next year, every year,” said Holistiplan co-founder Kevin Lozer. “Providing insights on tax strategies could be especially helpful for financial planners and their clients right now.”

With Holistiplan, a new tax planning software for advisors built to systematize and automate the process of reviewing a client's tax return, advisors can focus more on advising their clients, not inputting data and crunching numbers the old-fashioned way.

“We are especially excited about using the ‘Solve for Max’ feature, an enhancement to the existing program that can find ‘the upper limit’ of a client’s tax bracket,” said Wood. “Partnering with the team at Holistiplan was a natural fit for us, and the next step in reinventing the value our advisors deliver to our ultra-high-net-worth clientele.”

“Given all the complexities that tax-focused financial advisors are seeing now, having a conversation with clients about something other than investments shows that they are adding value and taking a comprehensive approach to planning,” said Holistiplan co-founder, Roger Pine.

ORIGINS OF HOLISTIPLAN

Holistiplan was created and designed by two CFP® professionals. Being firm owners themselves, they were constantly looking for ways to efficiently and consistently provide their financial planning service to clients. As engaged volunteers for the National Association of Personal Financial Advisors (NAPFA), they also spoke to many other firm owners that had similar concerns.

They designed this software to accomplish what has historically been two competing goals in the financial planning profession: Make the financial planning process faster for the professional, while making it better for every client. Their solution is to use the latest technological advances to read uploaded financial planning documents and generate client-ready reports (with the subscribing financial planning firm’s logo) that provide planning opportunities.

Holistiplan’s initial product focuses on tax planning. An advisor can upload their clients’ tax return to generate a client-ready report. After reviewing the report, the advisor can use the 2018 or 2019 tax data to run various tax scenarios for the next year and beyond.

“Our hope with this initial product is to replace the tedious and somewhat cumbersome tax planning software that exists for our profession today,” Lozer said.

ABOUT HOLISTIPLAN

Holistiplan, a tax planning software solution, helps financial planners be more comprehensive and more efficient. Created by two CFP® professionals, Holistiplan drastically reduces the time it takes to provide tax planning for clients. An advisor uploads clients’ tax returns to generate white-labeled, client-ready tax planning reports within seconds, with no data entry. The tax return data also pre-populates a tax projection tool for more detailed tax planning. Holistiplan is removing barriers for advisors to provide robust tax planning services to their clients. Holistiplan won [XY Planning Network's \(XYPN\) fourth annual Advisor FinTech Competition](#) in September 2019. The award-winning tax planning software solution for financial advisors was recognized for its automated review of 2018 tax returns, providing client-ready reports that identify financial planning opportunities. Learn more at www.Holistiplan.com.

ABOUT CARSON

Carson Group serves financial advisors and investors through its businesses including Carson Wealth, Carson Coaching, and Carson Partners. The family of companies offers coaching and partnership services to advisor firms – and straightforward financial advice to the investing public. All three organizations are headquartered in Omaha, Nebraska, and share a common mission to be the most trusted for financial advice. Carson Partners offers investment advisory service through CWM, LLC, an SEC Registered Investment Advisor. Carson Partners, a division of CWM, LLC, is a nationwide partnership of advisors. Carson Coaching and CWM, LLC are separate but affiliated companies and wholly-owned subsidiaries of Carson Holdings, LLC. Carson Coaching does not provide advisory services. For more information, visit www.CarsonGroup.com.

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