

NEWS

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Media Contact:

Leesy Palmer or Marie Swift
Impact Communications, Inc.
913-649-5009

LeesyPalmer@ImpactCommunications.org



Jeffrey Levine joins Holistiplan

Financial Industry Guru Will Serve as Resident Tax Expert

College Station, TX [November 10, 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 that Jeffrey Levine CPA/PFS, CFP®, AIF®, CWS® will join Holistiplan as Tax Planning Strategist.

“We are very excited that Jeff is joining the Holistiplan team,” said Kevin Lozer, co-founder Holistiplan. “Jeff is one of the most respected tax planning authorities in our industry. Just as important, Jeff is also an advisor who can articulate technical tax concepts in a digestible way. We can't think of anyone more qualified to help us add more tax functionality to the software, while still executing our vision to make the software intuitive and efficient to use.”

“Jeff's history in the profession aligns perfectly with our mission to help advisors deliver richer financial planning to more clients. He demonstrates that every day through his work to educate advisors. We think he is the perfect addition to our team as we work to make tax planning more efficient and accessible to all,” said Roger Pine, co-founder Holistiplan.

“Jeff Levine is a rock star in our profession on the technical side of the planning service,” said Bob Veres, editor and publisher of the Inside Information interactive guide to trends and innovations in the profession ([www. BobVeres.com](http://www.BobVeres.com)). “I can't think of anybody better to facilitate broader planning dimensions to the Holistiplan tax planning engine.”

“Roger and Kevin have created an incredible solution that helps to answer one of most common questions I hear from the advisor community; ‘How can I efficiently help my clients minimize the impact of income taxes as part of their overall financial plan?’ For many advisors, I believe that Holistiplan is the best answer to that question,” said Levine. “Its intuitive and advisor-friendly interface, coupled with its dynamic planning capabilities and elegant reporting, make it a powerful tool for advisors looking to up their tax-planning game. And its state-of-the-art OCR engine helps automate data-entry and give advisors back the one thing that can’t be replaced: Time,” said Levine.

“If anyone is wondering if I’ll be changing any of my other roles and activities with Buckingham Wealth Partners, Kitces.com, Horsesmouth, etc., let me just reassure folks that no changes are on the horizon. I’ll continue on in those roles. I am adding this role with Holistiplan and look forward to helping with strategy and iterative improvements to what is already an amazing tax planning solution for financial advisors and CPAs,” added Levine.

ABOUT HOLISTIPLAN AND JEFFREY LEVINE

Jeffrey Levine, CPA/PFS, CFP[®], AIF[®], CWS[®], is a nationally recognized thought leader within the financial planning community. Levine is Director of Advanced Planning at Buckingham Wealth Partners, and is the lead financial planning nerd for Kitces.com, home of the popular Nerd’s Eye View blog. He is also the founder of Fully Vested Advice, Inc., which provides financial education and consulting services to industry professionals. In 2020, Jeffrey was named to Investment Advisor Magazine’s IA25, as one of the top 25 voices to turn to during uncertain times. Also in 2020, Jeffrey was named by Financial Advisor Magazine as a Young Advisor to Watch. Jeffrey is a recipient of the Standing Ovation award, presented by the AICPA Financial Planning Division for “exemplary professional achievement in personal financial planning services.” He was also named to the 2017 class of 40 Under 40 by InvestmentNews, which recognizes “accomplishment, contribution to the financial advice industry, leadership and promise for the future.” Levine is regularly sought after by journalists for his insights and is frequently quoted in publications throughout the country.

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.