

NEWS

FOR IMMEDIATE RELEASE



Media Contacts:

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

LeesyPalmer@ImpactCommunications.org

Holistiplan and Kitces.com Infuse Tax-Focused Advisor Education into Award-Winning Platform

Kitces Education to provide advanced tax planning course and tax content for advisors using Holistiplan's industry-leading software

COLLEGE STATION, TX [September 7, 2022] – [Holistiplan](https://www.holistiplan.com), the industry-leading tax planning software tool built by and for financial advisors to make tax planning radically more efficient and scalable, has announced a new partnership with [Kitces.com](https://www.kitces.com). Kitces.com will provide advanced educational content on tax planning through an integration into the Holistiplan software for paying Holistiplan users. In addition, all Holistiplan users will receive an exclusive offer to access the Kitces.com updated-for-2022 tax course, *How to Find Planning Opportunities When Reviewing a Client's Tax Return*.

The agreement comes at a time of significant growth for the award-winning Holistiplan which has exploded to more than 12,000 users in the three years since their launch. In those same three years, their OCR (Optical Character Recognition) technology has read more than ten million pages of tax returns, saving advisors tens of thousands of collective hours.

“Kitces.com is the first place many advisors go when they want to learn more about important financial planning topics. For our subscribers to be able to access this industry leading tax planning educational content from within our software, at just the click of a button, is a huge win for everyone,” said Holistiplan Co-Founder/CEO Roger Pine. “We’re seeing a shift in tax planning as more advisors understand both the value and the implications of choosing to ignore this important issue. Clients consistently rate tax planning as one of the most important elements to them. With that shift comes the need to provide deeper education to help advisors not just do tax planning but to also do great tax planning – the kind of tax planning that makes a material difference in the life of the client. This partnership, both the integration and the tax planning course, will do exactly that.”

CENTERPIECE OF THE PARTNERSHIP

The partnership with Kitces also coincides with a recent expansion of Kitces.com, which last year rolled out its new “Kitces Courses” providing deep-dive, skills-based courses on *Reviewing Tax Returns* and

Optimizing Social Security for Couples. This summer, on the heels of a recent launch of continuing education credits (CE) for independent financial advisors who need to fulfill the new [NASAA Model Rule for IAR CE](#), Kitces rolled out a 2022 update to its popular tax planning course, *How to Find Planning Opportunities When Reviewing a Client's Tax Return*, which forms the centerpiece of its partnership with Holistiplan. A growing number of financial advisors are seeking to further extend their knowledge in providing deeper advice in the domain of tax planning.

“As portfolio construction becomes increasingly commoditized, and advisors seek new ways to add value in the financial planning process, there has been a marked shift towards providing more and deeper tax planning support – which we’ve seen in both the rapid growth of Holistiplan, and the rapid increase in demand for advanced tax planning content on Kitces.com,” said Publisher and Chief Financial Planning Nerd, Michael Kitces. “Proactive tax planning is unique as a value-add for advisors, not only because we need to be able to quantify the ongoing tax consequences of our investment recommendations, but also because good tax planning beyond the portfolio alone can provide concrete ‘hard-dollar’ tax savings that create immense value in the eyes of clients. So, it makes sense that advisors are taking the time to get more educated on what it means to provide real tax planning and getting the knowledge they need to maximize the use of new tax planning tools like Holistiplan. We’re thrilled to have the opportunity to work with Holistiplan and their rapidly evolving software solution to help advance education for advisors on tax planning topics.”

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 Holistiplan.com.

ABOUT KITCES.COM

Kitces.com publishes the #1 financial planning industry blog, *Nerd's Eye View*, and provides a wide range of advanced educational content for financial advisors through both nerdy long-form educational articles, research white papers, in-person and virtual live events, on-demand and livestream webinars, and online courses. The Kitces.com Members Section provides continuing education credits for a wide range of financial advisor licenses and advanced professional designations, including CFP[®] certificants, designations from the Investments & Wealth Institute and American College, CPE for CPAs and Enrolled Agents, investment adviser representative (IAR) CE obligations, and more. For more information, visit Kitces.com.

###

