

# NEWS

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## Holistiplan Hits 10,000 Users on Award-Winning Tax Software

*Company launches pro bono tax planning initiative by providing 10,000 free tax return uploads; 10,000 meals donated to No Kid Hungry*

COLLEGE STATION, TX [April 26, 2022] – [Holistiplan](#), an award-winning technology solution for financial professionals, today announced reaching 10,000 users on their tax software platform. Holistiplan helps financial advisors systematize and automate the process of reviewing a client’s tax return to find potential planning opportunities. To celebrate this milestone, Holistiplan is launching 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.

### 10,000-USER MILESTONE

Since launching less than three years ago, Holistiplan has added 10,000 advisor users from across the country. Co-founder and President, Kevin Lozer, CFP®, and Co-Founder and CEO, Roger Pine, CFA®, CFP®, attribute their rapid growth and profitability to the loyalty and valuable feedback from their advisor community. Holistiplan has already been voted the #1 tax planning software for advisors in both the [2021 T3/Inside Information Software Survey](#) and [2021 Kitces Research Technology Study](#).

“When we first dreamed up the idea for this software, we could have never predicted how favorably the advisor community would respond to it. Certainly not in such a short time frame. But the response has met and exceeded our expectations in every possible way,” said Pine.

“We are so grateful to the advisors who have embraced Holistiplan. It has been such a privilege to meet so many of them along the way. We couldn’t have done this without them, especially those who bought in from the very early days and gave such invaluable feedback to help us get better. The work they are doing for their clients gives us daily inspiration to innovate and improve. We really believe we’re just getting started, and the best is yet to come both for us and the advisors we have the privilege of serving,” said Pine.

### 10,000 TAX RETURN UPLOADS TO PRO BONO CLIENTS

To honor their 10,000-user milestone, Holistiplan is launching a tax planning pro bono program to donate 10,000 complimentary tax reviews to be used by the Holistiplan community of advisors on request.

“We are thrilled to hit this 10,000-user milestone, and we want to thank every advisor who has added Holistiplan to their tech stack,” said Lozer. “As a thank you and celebration, we want to support their pro bono efforts by launching our Pro Bono Tax Planning Initiative, which will provide 10,000 complimentary tax return uploads to our advisor community on an ongoing basis for the pro bono families they help,” said Lozer.

“We wanted to honor advisors and do something to give back to the community, which is what advisors do every day. Providing pro bono tax planning, powered by Holistiplan, is the perfect way to honor the advisor’s end clients,” said Lozer. The initiative serves advisors and their pro bono clients for years to come, not just for the current tax year.

### **10,000 MEALS DONATED TO NO KID HUNGRY CHARITY**

To celebrate this accomplishment of 10,000 users, Holistiplan has donated 10,000 meals to No Kid Hungry, a national campaign run by Share Our Strength, a nonprofit working to solve problems of hunger and poverty in the United States and around the world.

“We recognize there are even larger food-scarcity problems to solve, so we are also donating 10,000 meals to No Kid Hungry. As Holistiplan continues to grow, we will always be looking for more opportunities to give back to the advisor community and their pro bono causes,” said Lozer.

### **HOLISTIPLAN FOUND FORMULA FOR UNDERSERVED SEGMENT OF ADVISORTECH LANDSCAPE IN JUST THREE YEARS**

“I was certain that Holistiplan was going to be popular with financial advisors the moment that Roger and Kevin first debuted their tax planning software at the 2019 XYPN FinTech Competition,” said Michael Kitces, Co-Founder of XY Planning Network and Chief Financial Planning Nerd at Kitces.com. “The ongoing pressure on financial advisors to add more value to justify their fees is driving more and more fin tech companies towards demonstrating the tangible financial savings of good tax planning. Holistiplan allows that planning to occur in a fraction of the time it has traditionally taken to manually review a client’s tax return by hand. Holistiplan has quickly become the dominant leader in a long-underserved segment of the AdvisorTech landscape with one of the highest user ratings of any software we track in our Kitces AdvisorTech Research,” said Kitces.

### **HOLISTIPLAN AT T3 IN DENTON, TX**

Holistiplan will be at the T3 Technology Conference on May 2-4, 2022 in Denton, Texas, with a booth in the Exhibit Hall. Stop by during breaks to speak directly with team leadership about the software. T3 conference goers will also want to say hello to Torie Happe, who is now Head of Partnerships for Holistiplan. Happe is a tenured relationship manager who has in the past contributed to the success of Riskalyze, Flyer, and OnRamp. Happe is also the co-host of the popular Taco Tech podcast (find her in Podcast Alley at T3).

### **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<sup>®</sup>, CFP<sup>®</sup>, and Kevin Lozer, CFP<sup>®</sup>, 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](http://holistiplan.com).

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