

NEWS

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Holistiplan Tax Planning Technology Now Available to LPL Financial Advisors

Award-winning technology gives financial professionals an opportunity to add significant value in reporting and financial planning

COLLEGE STATION, TX [November 17, 2022] – [Holistiplan](#), the industry-leading tax planning software for financial advisors, today announced a partnership with [LPL Financial](#). As part of LPL’s vendor affinity program, Holistiplan will now provide LPL’s nearly 21,000 financial advisors with discounted access to their platform in addition to ongoing training and best practices. The Holistiplan software was built to systematize and automate the process of reviewing a client’s tax return to find potential planning opportunities.

TAX PLANNING SOFTWARE FOR LPL’S NEARLY 21,000 INDEPENDENT ADVISORS

“We’re excited to announce that LPL Financial has chosen Holistiplan as the tool to help their advisors provide streamlined tax-related services,” said Roger Pine, CFP®, CEO and Co-Founder of Holistiplan. “Our technology will allow both advisors new to tax planning and tax planning experts to have better conversations with their clients and to provide additional value to all of their clients quickly, uniformly and efficiently.”

“We believe comprehensive wealth management planning includes tax planning,” said LPL’s Executive Vice President of Wealth Management Solutions, Robert Pettman. “Providing best-in-class tools such as Holistiplan helps advisors differentiate their tax-related offering. We view this access to Holistiplan’s software as a first step to helping advisors better plan for their clients’ needs. The platform’s automated processes should also give advisors more time to focus on building their clients’ comprehensive wealth management plans.”

“Partnering with LPL Financial furthers our mission of providing tax planning solutions to more advisors to benefit more families,” said Kevin Lozer, CFP®, Chief Strategy Officer and Co-Founder of Holistiplan. “We’re honored to be one of the select technology tools LPL offers for use to their advisors.”

Since launching in July 2019, Holistiplan has added over 13,000 users from across the country. Founders Lozer and Pine attribute their rapid growth to the loyalty and valuable feedback from their advisor community of subscribers. Holistiplan has already been voted the #1 tax planning software for advisors in both the 2021 and 2022 [T3/Inside Information Software Survey](#) reports, and the 2021 [Kitces Research Technology Study](#).

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 www.holistiplan.com.

ABOUT LPL FINANCIAL

LPL Financial (Nasdaq: LPLA) was founded on the principle that the firm should work for the advisor, and not the other way around. Today, LPL is a leader in the markets it serves,* supporting nearly 21,000 financial advisors, and approximately 1,100 institution-based investment programs and approximately 500 independent RIA firms nationwide. LPL is steadfast in its commitment to the advisor-centered model and the belief that Americans deserve access to personalized guidance from a financial advisor. At LPL, independence means that advisors have the freedom they deserve to choose the business model, services, and technology resources that allow them to run their perfect practice, and they have the freedom to manage their client relationships, because they know their clients best. Simply put, LPL takes care of advisors, so they can take care of their clients. Learn more at www.lpl.com.

**Top RIA custodian (Cerulli Associates, 2020 U.S. RIA Marketplace Report); No. 1 Independent Broker-Dealer in the U.S. (Based on total revenues, Financial Planning magazine 1996-2022); among third-party providers of brokerage services to banks and credit unions, No. 1 in AUM Growth from Financial Institutions; No. 1 in Market Share of AUM from Financial Institutions; No. 1 in Market Share of Revenue from Financial Institutions; No. 1 on Financial Institution Market Share; No. 1 on Share of Advisors. (2021-2022 Kehler Bielan Research & Consulting Annual TPM Report). Fortune 500 as of June 2021.*

LPL and its affiliated companies provide financial services only from the United States.

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