MEDIA ALERT

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Webinar on April 28 will Dissect a Tax Return, Uncover Planning Opportunities for Financial Advisors

Kevin Pine, CFA®, CFP®, and Kevin Lozer, CFP® will show attendees how they use Holistiplan a comprehensive tax planning tool. They will also demonstrate the new "Solve for Max" feature.

To help financial professionals better understand the array of opportunities that could be available for clients, award-winning comprehensive tax planning software, Holistiplan co-founders, Roger Pine, CFA®, CFP®, and Kevin Lozer, CFP®, are hosting a webinar on April 28, 2020 at 3pm ET.

Over 600 advisors are registered at this time. This indicates there is great interest in this timely topic. During the one-hour webinar, Pine and Lozer will walk attendees through a tax return and point out a number of planning opportunities they might uncover with the Holistiplan software.

Journalists are invited to attend, ask questions, etc. A recording will automatically be sent to anyone that registers.

Date: Tuesday, April 28, 2020
Time: 3pm ET

Register here: https://register.gotowebinar.com/register/2661556317611934988

View related news release:
www.prnewswire.com/news-releases/holistiplan-helps-financial-advisors-reassure-clients-and-find-planning-opportunities-301040470.html

WEBINAR OVERVIEW

Pine and Lozer will not only talk about what their software does, but they will also point out things that advisors are or should be doing when looking through a tax return.

“It doesn't sound like great television or radio, but we are literally going to be walking through a tax return. Highlighting, when you see something on this line, what does it mean? What strategies does that trigger? We have an hour scheduled, but we will probably have to cut it short, because when you really dig into a return, there is a lot there,” said Pine.

“Given all the complexities that tax-focused financial advisors are seeing now, this could be one of the most important webinars advisors will attend in 2020. Having a conversation with clients about something other than investments shows that they are adding value and taking a comprehensive approach to planning,” said Lozer.

During the webinar, they will demonstrate how to use the new “Solve for Max” feature, an enhancement to the existing program that can find “the upper limit” on a client’s tax bracket.

Learn more about Holistiplan at www.holistiplan.com.

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