

6 Ways Tax Planning Software Helps Advisors Grow Their Firms

Technology has transformed the way advisors do business— the impact of adding a new tool to your tech stack not only increases efficiency, it provides holistic benefits to advisors who want to grow their firms. Check out these 6 ways tax planning software helps you get ahead of the competition.

PROVIDES ADDED VALUE

Combining advising and tax planning services is a valuable convenience that shows you understand and care about your clients' needs.

When clients with held-away assets see the added tax benefit, you're giving them another reason to entrust the rest of their assets to your firm.

IDENTIFIES MORE PLANNING OPPORTUNITIES

INCREASES EFFICIENCY

Provides an additional service to clients that adds hardly any workload to your team, allowing them to focus on growth-related activities.

Want an easy lead-gen source that gets more prospects through your door? Offer tax consultations.

PROMOTES LEAD-GEN

SCALES EFFICIENTLY

Adding tax planning software to your tech stack is like hiring a tax planning professional without investing the time and money.

Teaming up with a tax planning software gives advisors a unique way to set themselves apart from the competition.

DISTINGUISHES YOU FROM OTHER ADVISORS

Holistiplan helps thousands of advisors easily provide tax planning services. Read tax returns and generate reports with actionable planning opportunities in seconds with just the click of a button— starting at less than \$40 per month.



holistiplan

Want to try Holistiplan's automated tax optimization platform for yourself for free? Visit [Holistiplan.com](https://www.holistiplan.com) to sign up for a free trial.