

# Tax Efficiency On the Spot

Receive dynamic tax efficiency planning with Holistiplan, our new software that can deliver you results quickly, often during your annual meeting.

## 1 Upload your tax return.

We use state-of-the-art optical character recognition software to read your return quickly, often within a few minutes.

## 2 Receive your tax report.

The report gives us insight and actionable steps to improve your tax efficiency, finding places where you can tighten the process and get you tax savings you're already earning.

## 3 Look to the future.

We're able to think two to three years ahead based on your prior year tax situation. What income phaseouts are approaching? Should you adjust your Roth contributions? What if your income increased substantially?

## 4 Analyze the big picture.

Your tax profile affects other parts of your financial picture as well. We'll see how your Medicare payments and Affordable Care Act tax credits are affected, the timing and effectiveness of Roth conversions and more.

We'll provide you a report with actionable steps for protecting your assets and a customized financial strategy based on the best data available – **yours**.

**Get in touch today to get started!**



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