

# Holistiplan.

SEI Strategic Partner



## Leverage our relationships to get discounted pricing on valuable services.

As part of our continued commitment to help advisors power wealth and focus on client relationships, we have established strategic partnerships with several key business service partners to help you **reduce costs**, **save time** and **increase efficiencies** to run a more successful firm.

## Holistiplan

Holistiplan is a tax planning software solution for advisors, built to systematize and automate the process of reviewing a client's tax return to uncover potential planning opportunities. Holistiplan was created and designed by two CFP's®. The software accomplishes what has historically been two competing goals in the financial services profession: to streamline the financial planning process for advisors.

### Contact

[info@holisitiplan.com](mailto:info@holisitiplan.com)

### Discount

10% | Promo code: 22sei10

### Website

<https://info.holistiplan.com/sei>

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