holistiplan

Your Post-Filing **Workflow**

5 steps to take you from filed return to planning conversation

Client Upload Links

Step 1: Collect the return

- [ ] From the household, go to Tax tab → Returns & Transcripts → Create Upload Link.
- [ ] Select the client and tax year, then copy the generated link.
- [ ] Send the link to the client through your normal communication channel.
- [ ] Wait for the email from Holistiplan confirming the return is processed.

The Tax Explainer

Step 2: Read the return

- [ ] From the household, open the Tax Explainer next to the uploaded return.
- [ ] Walk the six sections in order: Income & Wages → AGI → Taxable Income → Total Tax → Credits & Payments → Tax Owed.
- [ ] Note the line-number references for any item you plan to discuss with the client.
- [ ] Use the teal buttons at the top to jump to the return, the Tax Report, or Scenario Analysis.

The Tax Report

Step 3: Uncover opportunities

- [ ] Access the Tax Report from Tax Explainer or from the household.
- [ ] Review Key Figures, Marginal Brackets, Schedule B Income Sources, Schedule D Capital Gains & Losses, and Observations.
- [ ] Pin two or three Observations as your meeting agenda; reorder or hide as needed.

Scenario Analysis

Step 4: Model scenarios side-by-side

- [ ] From the household, go to Returns & Transcripts and click Generate Scenario next to the return
- [ ] With the loaded return locked as Scenario 1, click + Add a Scenario → Copy from a Scenario → Scenario 1.
- [ ] Update the tax year to 2026 to create a Baseline Scenario.
- [ ] Copy the baseline, rename for the planning strategy (e.g., "2026 Roth Conversion"), then edit any income, deduction, or credit to model it.

Roth Projection Tool

Step 5: Demonstrate lifetime tax savings

- [ ] Navigate to Tax > Tax Planning on the left-hand navigation panel. Go to the Roth Projections section of that page and click "Create Roth Projection."
- [ ] Populate assets (taxable, tax-deferred, Roth), income, expenses, life expectancy.
- [ ] Review the Tax Bracket Visualizer for conversion opportunities within tax brackets.
- [ ] Model conversions; compare Base Case vs. Roth Conversion side by side.
- [ ] Watch for increased IRMAA premiums, RMD reduction, and end-of-plan portfolio value.

With one hour and one client return, you can:

- Demystify taxes for your client.
- Uncover hidden assets and income sources.
- Unlock multi-year planning opportunities.
- Build trust and deepen the client relationship.

Ready to run this workflow on a real client return?
Start your free 7-day Holistiplan trial!

Start Free Trial

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