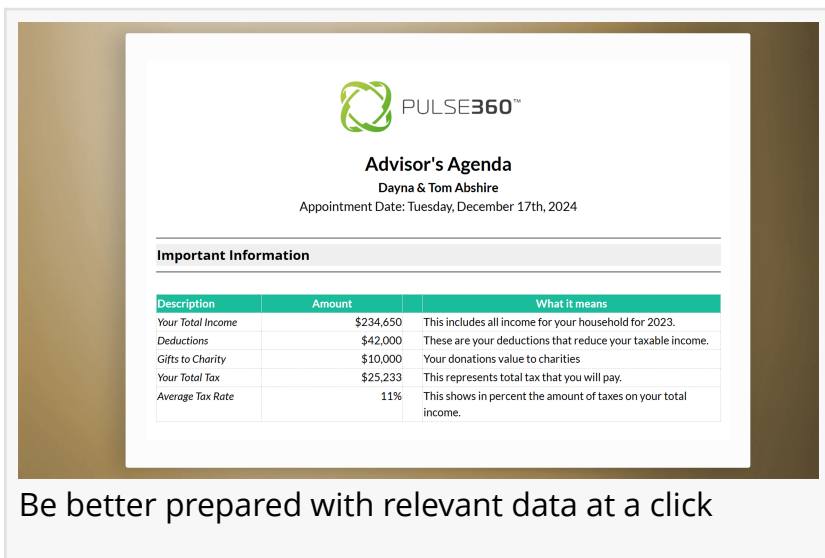


Pulse360 and Holistiplan Unveil Dynamic SmartFields, Revolutionizing Wealth Management Operations

Dynamic SmartFields helps advisors cut manual work, scale efficiently, and deliver a superior client experience

RIVERSIDE, CA, UNITED STATES,
December 23, 2024 /

EINPresswire.com/ -- Pulse360, a leader in innovative wealth management solutions, is proud to announce the launch of its groundbreaking feature, [Dynamic SmartFields](#). Designed to revolutionize how financial advisors interact with client data, this first-of-its-kind feature enables advisors to seamlessly pull critical data from third-party software directly into their client documents with just a few clicks.



The screenshot displays the Pulse360 logo at the top, followed by the title "Advisor's Agenda" and the name "Dayna & Tom Abshire". Below this, it shows the appointment date: "Appointment Date: Tuesday, December 17th, 2024". A section titled "Important Information" contains a table with the following data:

Description	Amount	What it means
Your Total Income	\$234,650	This includes all income for your household for 2023.
Deductions	\$42,000	These are your deductions that reduce your taxable income.
Gifts to Charity	\$10,000	Your donations value to charities
Your Total Tax	\$25,233	This represents total tax that you will pay.
Average Tax Rate	11%	This shows in percent the amount of taxes on your total income.

Be better prepared with relevant data at a click

The initial integration with [Holistiplan](#) sets the stage for an industry transformation. With

“

We're excited to announce Holistiplan's new integration with Pulse360, allowing advisors to seamlessly pull data into Dynamic SmartFields for faster, more efficient document creation.

”

Roger Pine, CFP®, CEO and Co-Founder of Holistiplan

Dynamic SmartFields, financial advisors can now access data points, such as a client's total income, directly within the Pulse360 platform—eliminating the need for time-consuming toggling between systems. Three years in the making, this collaboration demonstrates Pulse360's commitment to innovation and operational excellence.

Quote from Anand Sheth, CEO of Pulse360:

"The launch of Dynamic SmartFields marks a monumental leap forward in how advisors manage client data. At Pulse360, we believe in empowering financial advisors to focus on their clients rather than technology. Our partnership with Holistiplan is the first step in what we see

as a new era of integrated, intelligent tools that enhance efficiency, scale and client

satisfaction."

Quote from Roger Pine, CFP®, CEO and Co-Founder of Holistiplan:

"We're excited to announce Holistiplan's new integration with Pulse360, allowing advisors to seamlessly pull data into Dynamic SmartFields for faster, more efficient document creation," said Roger Pine, CFP®, CEO and Co-Founder of Holistiplan. "This integration enhances workflow efficiency, helping advisors better serve their clients."

Dynamic SmartFields simplifies complex workflows, reduces administrative burden, and ensures data accuracy—benefits that can directly impact the productivity and profitability of financial advisory practices. By making critical client data readily accessible, advisors can craft personalized client communications in less time, fostering trust and delivering superior service.

The collaboration with Holistiplan, an industry leader in tax planning solutions, is just the beginning. Pulse360 plans to expand Dynamic SmartFields to integrate with additional software providers, creating a seamless ecosystem for wealth management professionals.

About Pulse360

Pulse360, a 2024 AdviceTech Live Community Award recipient, a 2021 & 2023 Wealthmanagement.com Industry Awards Finalist, was created to make financial advisors at least 50% more productive. Our remote-ready SaaS suite can make every aspect of fiduciary meeting prep and documentation 10X more efficient. The Company was founded in 2019 by Anand Sheth and James Hill. The Company is headquartered in Riverside, CA.

About Holistiplan

Holistiplan is an award-winning tax planning software designed to help financial advisors provide comprehensive and efficient tax analyses. By automating complex calculations and simplifying reporting, Holistiplan enables advisors to focus on delivering value to their clients.

For more information about Dynamic SmartFields or to schedule a demo, visit

<https://pulse360.com/holistiplan-dynamic-smartfields>

Anand Sheth

Pulse360

+1 951-254-2373

[email us here](#)

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