

OnPointe Software Launches its Legacy Roth Conversion Analysis Feature — A True Industry First

OnPointe Software is redefining retirement planning once again with the launch of its Roth Conversion Legacy feature.

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[OnPointe Software](#) is redefining retirement planning once again with the launch of its [Roth Conversion Legacy](#) feature. With the industry's most accurate Roth conversion

software already in place, OnPointe is now the only program in the market capable of modeling the impact of Roth conversions on a client's heirs over their 10-year inherited period.

With OnPointe's new Legacy capability, the analysis now includes how much more after-tax money the heir(s) will have because their parents implemented a conversion—as well as how much they will save in RMDs and total taxes.

"Many times Roth IRA conversions are NOT a good financial decision for IRA owners (they won't have more money because of a conversion). But for consumers who will pass wealth to their heirs, the primary question is whether a conversion will generate more wealth for them over their 10-year inherited time period. This is the question, until now, no software has been able to answer." — Rocco DeFrancesco, Co-Founder of OnPointe Software

The expanded OnPointe Roth Conversion Software now offers:

- Exclusive Legacy Analysis – The only Roth conversion tool that models outcomes for both clients and their heirs (ones that include the most accurate IRMAA penalty numbers).
- Unmatched Accuracy – Powered by more than 40 variables, delivering the industry's most precise Roth conversion numbers.
- Unbiased Analysis – Designed to remove sales bias, providing clients with objective, data-driven results they can trust, not to push products.



- Built-In Lead Generation – Prospects can run their own numbers, creating qualified leads for advisors.
- Seamless Integration – Functions within [OnPointe Retirement Planner](#) or as a standalone solution.
- Client-Ready Reports – Complex strategies made simple, visual, and easy to explain.

For those interested in using the industry's most accurate Roth IRA conversion software that now comes with the industry's only legacy application, visit <https://onpointesoftware.com> or contact Lauren DeFrancesco at lauren@onpointesoftware.com or 269.325.1998.

About OnPointe Retirement Planner

OnPointe Retirement Planner is a leading provider of financial planning software, equipping advisors with innovative tools that deliver accurate, client-focused guidance in a fraction of the time compared to competitors.

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