

# Singular and Holistiplan Integration Solves the 'Fragmented Tech' Crisis for Financial Advisors

GOSHEN, NY, UNITED STATES, May 27, 2026 /EINPresswire.com/ -- New integration reflects growing demand for unified technology that brings tax insights directly into the advisor CRM

As financial advisors face mounting pressure to deliver holistic, tax-aware guidance, Singular by Patrina and Holistiplan have launched an integration to eliminate the "fragmented tech" bottleneck.



Singular and Holistiplan Integration Solves the "Fragmented Tech" Crisis for Financial Advisors

According to Kitces Research, a majority of financial advisors now offer tax planning as part of their services, yet many still rely on fragmented tools and manual processes to deliver it. The integration underscores a broader industry shift toward embedding tax planning directly within core advisor workflows, eliminating the need for disconnected systems and manual processes.

The integration bridges this gap by allowing advisors to upload tax returns directly within the [Singular CRM](#), where Holistiplan's OCR technology instantly extracts data to generate actionable reports without manual entry.

"This integration reflects a broader shift in the industry toward connected, workflow-driven technology," said Mark Opila, Chief Executive Officer at Patrina.

"Advisors don't want more tools—they want fewer, more powerful systems that work together. By integrating Singular and Holistiplan, we're helping firms bring tax planning into their core process, where it can drive more consistent and scalable client outcomes."

Key benefits include:

- Automatic creation of households and clients in Holistiplan from Singular
- Embedded client data synchronization across CRM and tax planning systems
- Direct upload of tax returns within the advisor workflow
- Automated tax return analysis with optional expert review

- Immediate access to tax planning reports within Singular
- Secure, end-to-end workflow with no duplicate data entry

The integration is available immediately for mutual clients of Singular by Patrina and Holistiplan.

#### About Singular by Patrina

Singular is a modern CRM and compliance platform built for RIAs, broker-dealers, and wealth management firms. It combines client relationship management, compliance oversight, and workflow automation into a single system, helping firms streamline operations, reduce risk, and improve productivity. Learn more at [www.patrina.com](http://www.patrina.com).

#### About Holistiplan

Holistiplan is a [fast-growing company in the FinTech sector](#), serving more than 50,000 users across the advisory community. Its award-winning software empowers financial advisors to deliver comprehensive financial planning at scale, bringing together tax planning, P&C insurance analysis, and estate planning in a single, unified system. Learn more at [www.holistiplan.com](http://www.holistiplan.com).

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