

NEWS | TECHNOLOGY

FP Alpha Enhances Tax Projector With AI-Powered Scenario Planning and Tax Insights

New Scenario Insights and Tax Projector Agent help financial advisors model future tax outcomes, explore “what-if” scenarios and identify actionable planning strategies using natural-language prompts.

By **Ankit Kankar** | September 13, 2026



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FP Alpha, an AI-powered advanced financial planning platform, announced significant enhancements to its **Tax Projector tool** designed to make sophisticated, forward-looking tax

planning easier and more accessible for financial advisors.

The enhancements include **Tax Projector Scenario Insights**, which enables advisors to generate FP Alpha's NextGen Tax Insights based on future client scenarios rather than relying solely on historical tax returns, and the **Tax Projector Agent**, an AI-powered experience that allows advisors to build and optimize tax scenarios using natural-language prompts.

Together, the capabilities expand FP Alpha's ability to help advisors move beyond identifying tax-planning opportunities to more easily modeling potential decisions, understanding their implications and identifying actionable strategies for clients.

"Tax planning can create tremendous value for clients, but historically it has required advisors to know both the strategy they want to explore and exactly how to model it," said **Andrew Altfest, CFP®, MBA, Founder and CEO of FP Alpha and President of Altfest Personal Wealth Management**. "We're breaking down those barriers. Our goal is to give advisors an intelligent partner that can help them explore the 'what ifs,' uncover opportunities they may not have thought to look for and turn those insights into meaningful conversations and actions with clients."

Altfest brings a distinctive perspective to the development of FP Alpha as both a practicing financial advisor and a wealth technology creator. His firsthand experience serving clients and running an RIA helped inspire the creation of FP Alpha and continues to inform the company's product strategy. Altfest also served on **CFP Board's AI Working Group**, which brought together leaders from financial planning, technology and academia to examine the impact of artificial intelligence on the profession and the evolving relationship between AI and human advisor expertise.

Turning Tax Planning from Backward-Looking to Forward-Looking

With **Tax Projector Scenario Insights**, advisors can run FP Alpha's NextGen Tax Insights directly against a saved Tax Projector scenario.

Instead of analyzing only what occurred on a client's most recently filed tax return, advisors can model a potential change, such as a Roth conversion, sale of appreciated assets, gain/loss harvesting strategy or significant income shift, and immediately generate insights based on that specific scenario.

FP Alpha can then proactively surface important considerations, such as remaining tax-bracket capacity or additional taxes that could be triggered by a proposed decision.

The result is a fundamentally different tax-planning conversation: rather than simply reviewing what happened last year, advisors can help clients understand **what could happen next and what they may want to do about it.**

Read online: <https://worldbusinesswatch.com/news/13/80/fp-alpha-enhances-tax-projector-with-ai-powered-scenario-planning-and-tax-insights.html>

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