

# We empower tax professionals with the tools to provide holistic wealth management.

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## Founded by a CPA for Tax Professionals

HD Vest Financial Services®, the pioneer of tax-smart wealth management services, supports a growing and prosperous community of independent advisors—providing holistic financial services for over 30 years.

### **\$44 Billion+\***

Assets currently under administration

### **4,000 Independent Advisors\***

Our Advisors serve more than 350,000 wealth management clients nationwide

### **400+ Experienced Industry Professionals**

A trusted and elite network of home office and virtual support, chapter directors and advisor mentors

### **100+ Local Chapters Nationally**

Our chapters meet regularly with peers and experience an unmatched, collaborative team atmosphere

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## Customized Tools and Programs

We have a set of exclusive tools and programs tailored to fit the specific needs of tax professionals looking to expand their business and client offerings.

### **1040 Analyst®**

Uncover hidden opportunities with the industry's most robust tax return mining tool

### **Strategic Partnership Program**

An innovative referral model designed to partner tax professionals with financial advisors to indirectly offer wealth management services through an existing HD Vest practice

### **HDV Link**

A fully-integrated, single sign-on portal that gives you the tools and resources needed to open new accounts, manage your business, and access client information.

### **Marketing**

Direct access to HD Vest marketing technology, materials and tips on best practices about how to effectively brand and market your practice

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## Allowing You to Be Truly Independent

Our continuously evolving approach is rooted by a client-centric model. We are here to support you and your clients in all financial service needs.

### **100% Non-Proprietary Products**

Mutual funds, ETFs, annuities, insurance, & qualified retirement plans

### **Your Clients are Your Clients**

No contracts. No non-competes. No non-solicits. HD Vest is a "Broker Protocol" firm

### **Dedicated Support Teams**

A coaching team for each Advisor that includes specialized support from a Wealth Management Support Consultant

### **Backed by Blucora**

Blucora, Inc. (NASDAQ:BCOR) is a leading provider of technology-enabled financial solutions to consumers, small businesses and tax professionals

\* As of March 2018

HD Vest Financial Services® is a wholly owned subsidiary of Blucora, Inc. (NASDAQ: BCOR). The HD Vest affiliated companies exclusively provide financial products and services, and do not provide or supervise tax or accounting services.

HD Vest Financial Services® is the holding company for the group of companies providing financial services under the HD Vest name. Securities offered through HD Vest Investment Services®, Member FINRA/SIPC, Advisory services offered through HD Vest Advisory Services®, 6333 N. State Highway 161, Fourth Floor, Irving, TX 75038, 972-870-6000.

**HD VEST**

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