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Phone: \_\_\_\_\_ Email: \_\_\_\_\_

### Approximate annual production:

- ☐ Up to \$25K    ☐ \$100K to \$250K  
☐ \$26K - \$50K    ☐ \$250K+  
☐ \$51K - \$100K

### Current Broker/Dealer:

- ☐ S6    ☐ S63    ☐ INS  
☐ S7    ☐ S65    ☐ RIA  
☐ S24    ☐ S66  
☐ S26    ☐ IAR

### I am a:

- ☐ CPA    ☐ RTRP  
☐ EA    ☐ Tax Professional  
☐ ABA    ☐ CFP®  
☐ ATA    ☐ ChFC®  
☐ ATP    ☐ Attorney

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**HD VEST®**



# See things in HD™

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HD Vest Advisors integrate taxes and financial planning for a more comprehensive picture. It's this unique approach that allows our advisors to provide an unmatched strategic perspective for their clients. They can peek around corners, find hidden opportunities, and provide maximum clarity. In other words, they can see things in HD.