



# **Build deeper client relationships**

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Set a new standard of client satisfaction.

As a tax professional, you are uniquely positioned to improve both your profitability and your client experience by diversifying your service offerings. Explore the benefits of offering holistic financial advice with steadfast support.

- **75% of HD Vest Advisors** report that adding financial services to their practices has positively impacted their clients' satisfaction.<sup>1</sup>
- **63% of firms** found that adding wealth management services improved their ability to attract new clients.<sup>2</sup>
- In five years, your practice can generate an average of **\$1.7 million in incremental revenue** by adding financial planning services — Leading to **\$670,000 of incremental profit**.<sup>1</sup>

Give your clients the financial services they need from an advisor they can trust.

Visit [www.hdvest.com/partner43](http://www.hdvest.com/partner43) to learn more.

## For a limited time only

Become a financial advisor  
and save up to \$1,300\*

\* Based on fees associated with federal and state registrations, study materials, exam fees, and background screen

# HD VEST®

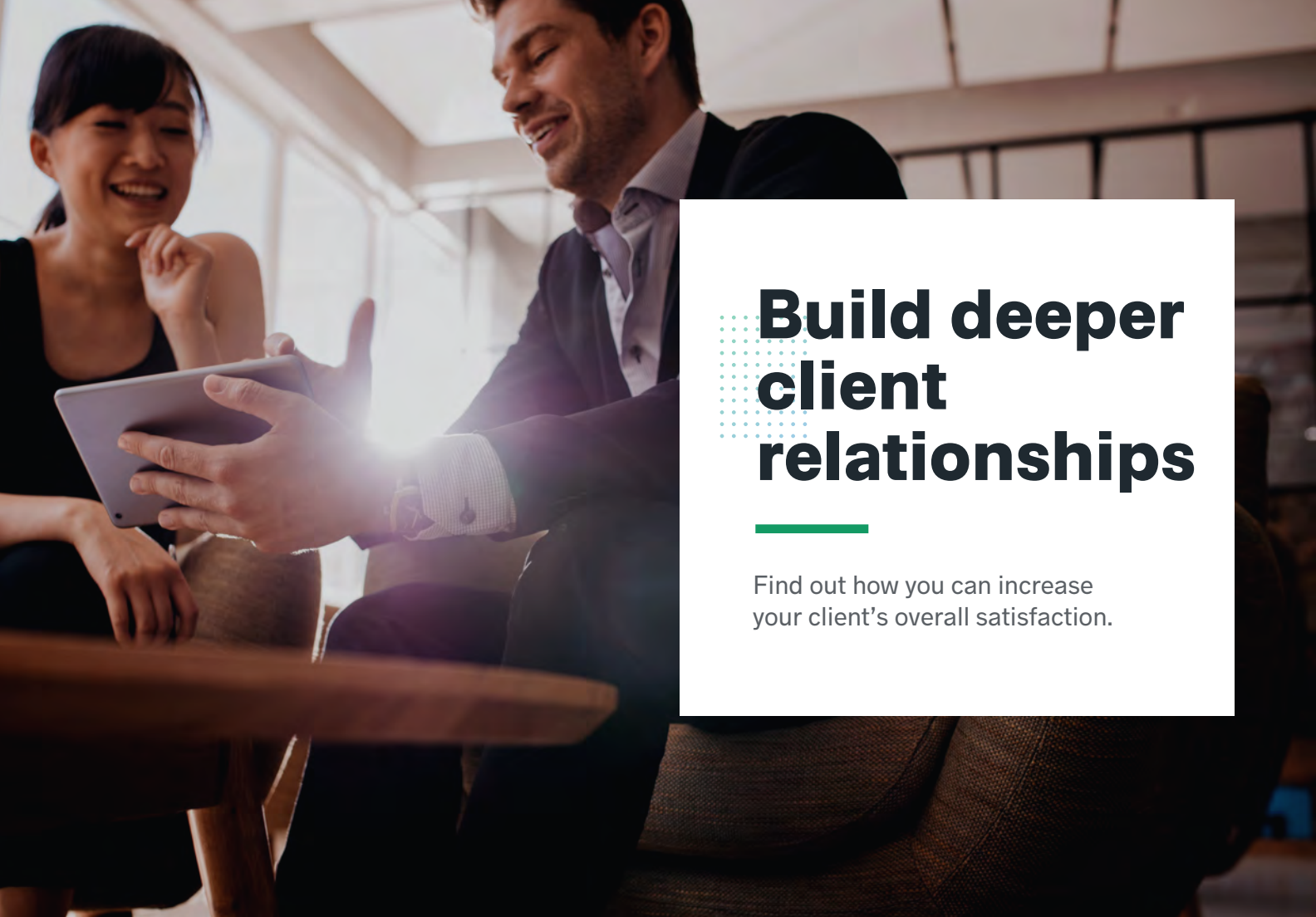
6333 N. State Highway 161, 4th Floor  
Irving, TX 75028

<sup>1</sup>HD Vest calculation based on data derived from 2017 IPSOS survey.

<sup>2</sup><https://www.journalofaccountancy.com/news/2014/dec/cpa-financial-planning-services-201411511.html>

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Find out how you can increase  
your client's overall satisfaction.

The tax profession is evolving, and your clients are seeking a one-stop-shop for all their wealth management needs. By diversifying your service offerings, you will not only better serve your clients, but also improve profitability. And HD Vest can help!

We service over 4,000 independent contractors, who manage over \$44 billion in assets.\* Ranked as one of the top independent broker-dealer firms, we know what it takes to make your practice flourish, including:

- **Licensing**
- **1040 Analyst® Technology**
- **Networking and Support**
- **Practice Management**
- **Marketing**

Add financial services to your practice through HD Vest is the best choice for both your clients and your business.

Visit [www.hdvest.com/partner43](http://www.hdvest.com/partner43) to learn more about enriching your tax practice through diversification.

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\*As of March 1, 2018

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