

WHO'S WHO

AMONG **TECHNOLOGY VENDORS** SERVING THE ACCOUNTING PROFESSION

MENT MANAGEMENT **FINANCIAL SERVICES** FIXED ASSETS GUIDANCE INTEGRATED SUITES PAYROLL PRACTICE MANAGEMENT TAX PREP TAX RESEARCH TIME & BILLING

25TH ANNIVERSARY



A non-bank subsidiary of Wells Fargo & Company

COMPANY OVERVIEW

H.D. Vest Financial Services® has been partnering with CPAs since 1983 to support them in offering financial services to their clients. More than 5,300 independent H.D. Vest Advisors collectively manage over \$30 billion in assets and provide investment and tax advice to more than 3 million individuals and small businesses in all 50 states. Over the past 25 years, we have learned that evolving markets continue to change clients' needs. Clients are demanding a broader range of financial products from their tax professional. At the same time, a recent survey of investors¹ found that CPAs topped the list of most trusted financial advisors — edging out Certified Financial Planners™.

As a tax professional, you are in a unique position to help your clients and increase the value of your practice at the same time. You need to partner with a firm that understands your business. H.D. Vest, a non-bank subsidiary of Wells Fargo & Company, offers its Advisors comprehensive investment solutions, dedicated home-office support, and leading-edge technology. This combination positions you to meet your clients' needs now and into the future.

The time is now for you to add financial services to your practice. You've heard the number before: 77 million baby boomers. Issues they face include parent care, their own health care, supporting children and frequently grandchild care. Today, 40 million baby boomers are over the age of 50 and ready to start taking their retirement planning seriously. How many of your clients were born between 1946 and 1964? Were you?

As a successful CPA, you already have valuable information at your fingertips that provides you with the resources to begin to address the financial concerns of your clients. Your clients trust your advice and will continue to approach you for help. You are in a unique position to become your client's wealth manager.



¹(2005, Amplitude Research, 1,007 investors surveyed)

MARKETS SERVED

H.D. Vest focuses on partnering with CPAs. We offer flexible affiliation options including fee planning, commission sales, or both, along with the option to offer popular banking products or team-up with a seasoned investment professional in our Partners Program.

PRODUCTS

H.D. Vest offers an array of financial solutions to help you round out your service offerings including:

- ▶ Retirement planning — IRAs and qualified plans;
- ▶ Investments — mutual funds for college funding, brokerage accounts for trading stocks, bonds and other products;
- ▶ Estate planning — concepts such as structuring beneficiaries, charitable remainder trusts, irrevocable life insurance trusts, basic family and bypass trust planning;
- ▶ Insurance services — life, disability, long-term-care, fixed and variable annuities; and
- ▶ Wells Fargo banking products such as mortgages, home equity products, small business loans, personal lines of credit, trust services, and traditional banking products.

TECHNOLOGY

H.D. Vest has developed a comprehensive suite of interactive tools designed to meet the needs of CPAs who want to successfully implement financial services. From detailed needs-analysis tools for clients and prospects, to a contact management system, dynamic marketing system and interactive business website, we offer a suite of systems that work together, or independently, to allow you to efficiently and intuitively integrate financial services into your practice.

Our ongoing technology enhancements continue the drive toward a Paperless Office. Submit your paperwork electronically, take advantage of real-time updates, view client

documents through every stage of processing, and utilize storage of all client data.

H.D. Vest was recently honored with its fifth annual financial planning award from the editors of *Accounting Today*, *WebCPA.com*, *Practical Accountant* and *CPA Wealth Provider*. In addition, H.D. Vest was recognized as one of five winners in the broker/dealer category "for leading through innovation, efficiency, initiative and growth in the financial planning area." Specifically, the award mentioned H.D. Vest's successful implementation of the first phase of the Paperless Office initiative and the Small-Business Virtual Summits.

SUPPORT

H.D. Vest guides you through the entire affiliation process. We provide before-the-sale advice and after-the-sale operational support. In addition, we offer study materials for your securities exams, marketing support as you introduce your new services to clients, and specialized support going forward including retirement planning, estate planning, insurance planning and banking support. Our support also includes compliance and sales supervision. With the most extensive support in the industry, we are just a phone call away, six days a week.

COMPANY NAME:

H.D. Vest Financial Services

ADDRESS: 6333 N. State Hwy 161, 4th Floor, Irving, TX 75038

PHONE: (800) 742-7950

E-MAIL: newbusiness@hdvest.com

WEBSITE: www.hdvest.com

NUMBER OF EMPLOYEES: 315

YEAR FOUNDED: 1983

Securities offered through H.D. Vest Investment ServicesSM, Member SIPC, Advisory Services offered through H.D. Vest Advisory ServicesSM, Non-bank subsidiaries of Wells Fargo & Company 6333 North State Highway 161, Fourth Floor, Irving, Texas 75038, (972) 870-6000



**MAKE A
DIFFERENCE**

**IN YOUR
CLIENTS'
LIVES**

Your baby boomer clients are looking to **YOU** to help them manage their income in retirement. This puts you in a unique position to become your clients' wealth manager.

Are you ready?

**H.D. VEST IS READY
FOR YOU.**

**DISCOVER YOUR
HIDDEN FINANCIAL
SERVICES PRACTICE.**

**Call (800) 742-7950 or
visit www.hdvest.com**

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