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## ***News Release***

For Immediate Release

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# ***Accounting Today* and HD Vest Financial Services Launch Tax Alpha Program**

***Newly Created Suite of Resources Helps Financial and Tax Advisors Deliver Tax-Savvy  
Wealth Management Services***

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**May 29, 2014, NEW YORK** — *Accounting Today*, the publication of record for the public accounting profession, and HD Vest, a leading independent broker-dealer empowering holistic tax and wealth management-based financial advice, today announced the launch of their joint Tax Alpha program. The Tax Alpha program is comprised of a comprehensive suite of resources, accessible online, designed to help financial and tax professionals deliver added value to their wealth management clients by offering deeper, more tax-savvy services.

Tax Alpha combines the expertise of *Accounting Today* and HD Vest to offer strategies, insights and proprietary research that will help advisors bring sophisticated tax tools to bear on their clients' financial plans in order to help minimize their tax bills in both the short- and the long-term, while maximizing their overall wealth. The Tax Alpha program is part of HD Vest's broader mission to enable the delivery of tax solutions alongside financial planning\*; a model that the company believes is the next logical stage of evolution for the independent financial advice industry.

Tax Alpha resources will be available through a dedicated microsite, [www.accountingtoday.com/tax-alpha](http://www.accountingtoday.com/tax-alpha), which will host articles, whiteboard videos, white notes and other materials to help advisors improve their clients' tax position. Additionally, certain of the program's most innovative and useful thinking will be selectively made available through a monthly column in the print edition of *Accounting Today*.

"We're focusing the Tax Alpha program on accountants and tax professionals because they're uniquely positioned to deliver this kind of advice to clients," said *Accounting Today* Editor-in-Chief Daniel Hood. "In addition to their natural understanding of tax issues, they're also deeply involved in and knowledgeable about their clients' tax situation."

“Tax professionals understand very clearly that it’s not what a client earns that’s important, but what they keep,” said Ruth Papazian, CMO and Head of Business Development at HD Vest. “At the same time, mass affluent retail investors increasingly recognize the enormous value of professional guidance that integrates expertise in the areas of personal tax and personal financial planning\*. More than ever, it is clear that a financial plan built to capture tax alpha has a much greater chance of protecting investment assets and preserving returns than a plan that focuses on investment performance alone. That, in turn, makes the relationship between the client and the advisor who provides this holistic level of service that much stronger and more durable.”

“We’re excited to work with HD Vest on this project,” said Publisher Jack Lynch. “Their long history of promoting holistic financial advice and their ability to work with tax savvy independent advisors; makes them a great partner for delivering these kinds of educational strategies to our audience.”

The Tax Alpha microsite is currently live, with a set of articles and videos explaining what “tax alpha” is and how it can help advisors offer better services. It will be updated on a regular basis with new articles, videos, white notes and other resources.

### **About *Accounting Today***

Founded in 1987, SourceMedia’s [Accounting Today](#) has been the newspaper of record for the public accounting profession for almost a quarter of a century, and is the leading source in print and online of information and insight for accountants in public practice, delivering premium content for firm decision-makers on everything from the latest developments in tax and accounting, to cutting-edge technology and best practices in management, growth strategies and more.

### **About HD Vest Financial Services**

HD Vest is a leading, privately-owned independent broker/dealer empowering the delivery of holistic and objective financial advice through a network of Advisors whose roots began and continue as tax professionals. HD Vest provides tailored training, practice management support, turnkey asset management solutions and comprehensive technology platforms to over 4,500 trusted independent Advisors across all 50 states, as well as facilitating opportunities to share best practices and obtain peer group mentoring. The firm is currently ranked number 20 in Financial Planning magazine’s 2013 list of top independent broker/dealers across the nation. HD Vest is headquartered in the Greater Dallas area, in Irving, Texas. For additional information, please visit [www.hdvest.com](http://www.hdvest.com).

\*Subject to appropriate licensing. Not all HD Vest Advisors are licensed to offer all products or services, including investment advisory or financial planning 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 ServicesSM, Member SIPC, Advisory services offered through HD Vest Advisory ServicesSM, 6333 N. State Highway 161, Fourth Floor, Irving, TX 75038, (972) 870-6000.

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