



**HD Vest's CONNECT2015 Annual Conference Draws Record Attendance;  
Highlighted by a Conversation with President George W. Bush, Hosted by CEO  
Roger Ochs**

**– Conference Designed Around Theme of “LEAD” Brought Industry Experts and  
Thought-Leaders to Nearly 1,000 HD Vest Independent Financial Advisors to Provide  
Growth-Enabling Training and Expertise –**

**– Top Speakers, Along with Exciting Social and Networking Events, Supplemented Over  
100 Breakout Learning Sessions during Three-Day Gathering –**

**Irving, TX, June 22, 2015** – HD Vest Investment Services<sup>SM</sup> – the leading independent broker-dealer focused on providing comprehensive training and support to independent financial advisors nationwide whose roots are grounded in tax professions – today announced the successful conclusion of CONNECT2015, its annual national conference, which drew a record attendance of nearly 1,000 independent financial advisors, as well as industry experts, noted thought-leaders and prominent investment-industry product sponsors, to the Omni Hotel in Dallas, TX, from June 16 - 19, 2015.

This year's conference theme was “LEAD,” which complemented HD Vest's 2015 yearlong focus on the topic of “Reinventing Growth: Building Momentum.” Under the banner of these two concepts, the conference provided inspiration, expertise and training aimed at enabling HD Vest advisors to transform the way they do business in order to grow and improve their practices.

“At HD Vest, our commitment to ‘reinvent ourselves’ and transform the way our advisors do business proved to be a catalyst for positive change and engagement with our team members and advisors during the past year,” said Roger Ochs, President & CEO of HD Vest. “At CONNECT2015, we encouraged our advisors to reinvent their own growth plans by learning and implementing tools that can streamline and enhance their practices. The event emphasized key differentiators that can lead our advisors and their employees to even greater success.”

The highlight of the conference was the general session's opening, President George W. Bush, the 43<sup>rd</sup> President of the United States, who engaged in an intimate Q&A with Mr. Ochs.

Other keynote speakers, whose originality and innovative thinking brought lively new perspectives to the conference, included:

- Eric Whitacre – Grammy-Winning composer and conductor, and creator of the “Virtual Choir,” Whitacre is one of the most popular choral composers in the world today. He explained how the drive to create can be harnessed in professional contexts, and he shared strategies to enable leaders to unlock creative inspiration in their teams.

- John Diehl, Sr. Vice President of Strategic Markets, Hartford Funds – Talking on “The Quality of Life,” Diehl presented new perspectives about living independently, experiencing life’s pleasures, and staying socially connected in retirement.
- Erik Wahl – Internationally recognized graffiti artist, best-selling author and entrepreneur, Wahl presented “UNthink™,” based on his popular book by that name, which challenged advisors to achieve superior levels of performance by inspiring them to let go of traditional thought patterns and helping them understand how to create disruptive strategies of innovation.

### **Breakout Sessions, Exhibit Hall “Mini-Sessions” and Networking Activities Drive Educational Opportunities**

The heart of the conference encompassed over 100 small-group breakout sessions, bringing advisors together with HD Vest’s educational and strategic partners, along with members of the home office, to share ideas and best practices. Many of the learning experiences and activities for CONNECT2015 were based upon advisor feedback from prior-year conferences.

Rounding out the educational experience, the conference included a new exhibit hall experience featuring interactive “mini-sessions” as well as an arena showcasing all the new Reinventing Growth tools HD Vest had already rolled out in 2014 – 2015. These included the highly successful V4 Client Experience™ client engagement process, which includes the 1040 Analyst® client evaluation tool, the 8 Wealth Management Issues® program, and tips for leading advisors’ end-clients through the successful, proprietary VestVision™ investment planning tool.

Additionally, the conference featured valuable informal networking opportunities, as well as social events open to advisors’ companions, which drew enthusiastic attendance. This year’s highlights included visits to the George W. Bush Presidential Library & Museum; a Dallas City Tour & JFK Sixth Floor Museum visit; a guided, behind-the-scenes tour and “touchdown” experience at AT&T Stadium, home of the Dallas Cowboys; and a Trio of Art in the Dallas Cultural District visit, among others.

Mr. Ochs continued, “It is extremely important to us at HD Vest that our affiliated advisors have the opportunity to gather together on an annual basis to hear about industry-wide best practices, learn from one another, and stay abreast of the latest industry developments. At HD Vest, we’ve built a unique culture based on a like-minded community of advisors who are there to help one another and share experiences. Fundamentally, CONNECT2015 underscored our unique value proposition in working with independent advisors and empowering them to provide holistic financial advice and achieve the best possible financial solutions for their end clients.”

Mr. Ochs concluded, “We were extremely pleased with the high quality of this year’s many presentations and learning opportunities, and we look forward to even more advisors attending our conference next year.”

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

Since its inception in 1983, HD Vest Financial Services® has supported an independent network of tax and non-tax professionals who provide comprehensive financial services solutions including securities, insurance, money management services, and banking solutions. Ranked as one of the top 20 independent broker-dealer firms,<sup>1</sup> we know what it takes to make your practice

really flourish. Approximately 4,500 independent contractors manage over \$37 billion in assets for individuals, families and small businesses in all 50 states.<sup>2</sup>

<sup>1</sup>Investment Advisor *2014 Broker-Dealer Reference Guide*, which measured/ranked the top 25 independent broker-dealers by annual revenue.

<sup>2</sup>As of January 1, 2015

HD Vest Financial Services® is the holding company for the group of companies providing financial services under the HD Vest name.

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