



HD Vest Launches VestVision™, a Customized Financial Planning Software System, Assisting Advisors and Clients to Visualize and Focus on Holistic Goals-Based Wealth Management

-- New Tool and Investment Management Process Seamlessly Integrates with HD Vest's Comprehensive Advisor-Client Platform and Recently Introduced Technology and Financial Planning Offerings --

Irving, TX – August 6, 2014 – HD Vest Investment ServicesSM, the leading independent broker/dealer empowering holistic tax and wealth management-based financial advice, today announced the launch of VestVision™, a customized financial planning software system that enables HD Vest Advisors and their clients to easily define and prioritize their financial goals, implement and adjust wealth management solutions, track and visualize progress, while encompassing the totality of a client's financial assets, whether held at HD Vest or elsewhere.

Incorporated into the new tool is an eight-step planning process that keeps the Advisor and client tightly focused on meeting the client's personalized goals. Aided by an exclusive interactive goal prioritization tool called the "Priority Ladder," VestVision provides the transparency to demonstrate how well the client is achieving his or her goals, stress-tested against the simulation of 1,000 potential market environments. VestVision also offers the flexibility to make wealth management solution adjustments for each client as markets change and new events occur within their lives.

VestVision is fully integrated with HD Vest's comprehensive technology and financial planning platform, which, among others, includes Vest 360™, HD Vest's Advisor-facing technology platform and full-service hub for managing client assets; the newly launched V4 Client Experience™, which helps Advisors engage with their clients and lead them from a discussion of their tax return into the creation of a customized financial plan; the 1040 Analyst™, a new tool that enables tax advisors offering financial services to make financial planning recommendations based upon individualized tax return data; and the popular *VestAdvisor Select*® portfolio management service.

Scott Rawlins, Managing Sales Director at HD Vest, said, "Today, the overwhelming concern of most financial advisory clients is not how well their investments are performing against any particular index or market-related benchmark, but rather, on a personal level, whether they will have the money they need in order to meet their life goals and how they can best achieve that objective. The VestVision software is completely oriented to respond to those concerns, and to assist our Advisors in keeping their clients fully focused on their individual financial plans and avoid being distracted by extraneous developments. In this way alone, VestVision reinforces one of the greatest value enhancers that financial planners can provide.

Furthermore, by helping our clients define and prioritize their goals, then providing them with recommendations and implementing wealth management solutions, and following up with a clear and dynamically changing picture of how each client is individually progressing toward

their goals, VestVision makes the financial planning process transparent, easy to manage, and provides the client with considerable peace of mind.

Additionally, in our pilot testing with Advisors who have utilized this software, we have found that it has helped them garner a higher share of their clients' assets and increased their productivity by 20 – 30 percent over the course of a 12-month period. By including our Advisors' input into our customization of the VestVision software, and fully integrating VestVision with the rest of HD Vest's technology platform, we have been able to continue to enhance the value we provide both to our Advisors and their clients alike."

About HD Vest Investment ServicesSM

HD Vest Investment Services 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 nearly 5,000 trusted independent Advisors across all 50 states, as well as facilitating opportunities to share best practices and obtain peer group mentoring. The firm is 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.

Media Contacts

Matthew Griffes / Joseph Kuo
Haven Tower Group LLC
206-402-5853 or 206-420-3851
mgriffes@haventower.com or jkuo@haventower.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.*

VestVision is based upon the software, patents, copyrights and some of the trademarks owned, developed by or exclusively licensed to Wealthcare Capital Management, LLC. ("Wealthcare"). All Wealthcare content within VestVision supports the use of Wealthcare's method and system for financial advising, its method, system and computer program for auditing financial plans, the system and method for incorporating mortality risk in an investment planning model, and the related terminology specific to its patents are used under license from Wealthcare. (U.S. Patents numbers 6,947,904/7,562,040/7,650,303/7,865,138/7,991,675). HD Vest Advisors are responsible for developing individualized investment recommendations or financial and investment plans for their clients.

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