

About Avantax®

AVANTAX MISSION

To be the leader serving a community of CPAs, Tax Professionals & tax-focused Financial Professionals by providing their clients with tax-intelligent financial planning and investment solutions.

OVER
40
YEARS

Our firm was founded in 1983 by a CPA who believed every financial decision was a tax decision.

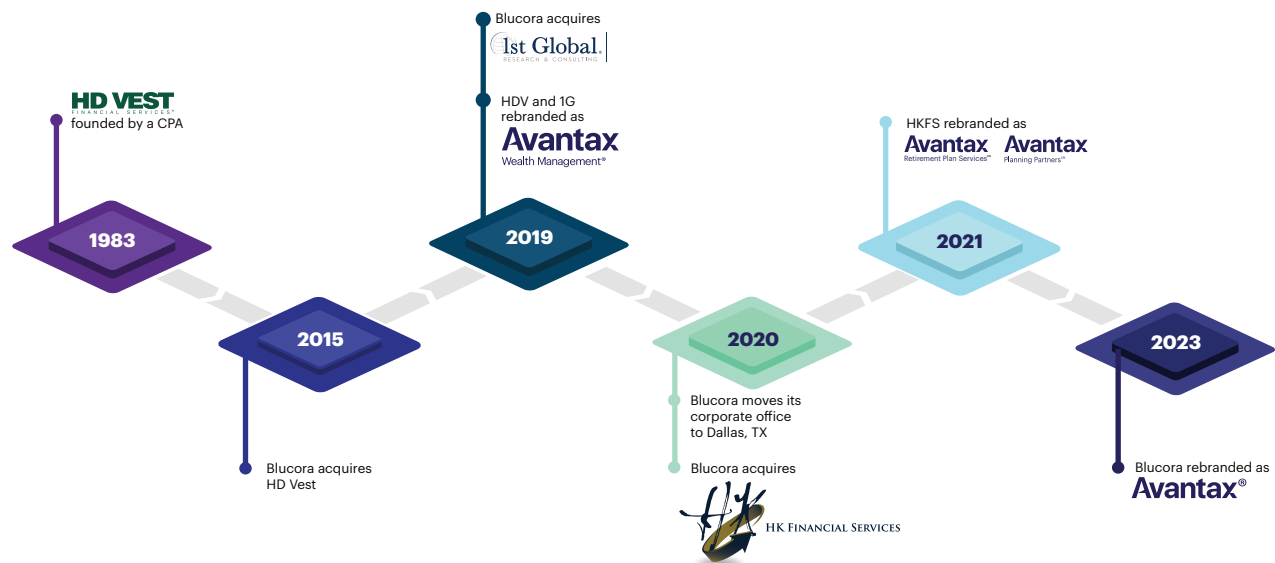
BY THE NUMBERS

3,000+ Independent Financial Professionals

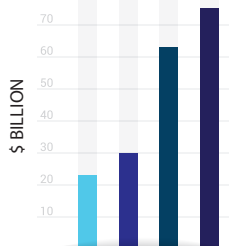
350,000+ Clients Nationwide



THE AVANTAX STORY



\$80B+
in total client assets*



*AUM as of March 31, 2023

**According to Financial Advisor magazine's 2023 rankings

12th

largest independent
broker-dealer in the
United States**



A LEADER IN SERVICE

Our Client Services & Operations team scored **80% satisfaction** on the Winter 2022 'Voice of Avantax' survey



Avantax Wealth Management® is the holding company for the group of companies providing financial services under the Avantax® name. Securities offered through Avantax Investment ServicesSM, Member FINRA, SIPC. Investment advisory services offered through Avantax Advisory ServicesSM and Avantax Planning PartnersSM. Insurance services offered through licensed agents of Avantax Insurance AgencySM, Avantax Insurance ServicesSM and Avantax Planning PartnersSM. Not all products and services listed are offered by all firms. Products and services listed may only be offered by properly licensed individuals. 3200 Olympus Blvd, Suite 100, Dallas, TX 75019, 972-870-6000. 052423