

The Avantax Advantage

Adding Value to Your Firm to Amplify Your Impact on Clients

When you partner with Avantax, you're part of an industry-leading team, but more importantly, we're an extension of yours. Our affiliated financial professionals remain independent—running their own businesses as they see fit—yet not alone in tackling their greatest challenges and opportunities. Take advantage of everything that makes Avantax special, and we'll help take your business to the next level.

A Tax-Intelligent Approach

Avantax affiliates have access to tax-intelligent platforms & processes that differentiate you in the marketplace.

A Collaborative Community

We provide the programs & best practices to enhance what you value most: peer-to-peer learning & continuing education.

Innovative Growth Support

Tap into our skilled specialists & outsourced solutions to augment the talent of your in-house team.

Industry-Leading Service

From training your assistants & 45-sec service response times to dedicated relationship managers & direct access to leadership, we'll be there when you need us.





A Tax-Intelligent Approach

Tax-intelligent financial planning has been part of our DNA since we were founded by a CPA more than 40 years ago. Our financial professionals have access to:

- » Avantax Intelligent Planning concepts, processes & client-friendly collateral.
- » Avantax Intelligent Platforms, such as our Capital Gains Analyzer, Tax-Loss Harvester, 1040 Analyst and Social Security Planner.
- » Avantax Intelligent Products, including direct indexing offerings, IMS tax solutions, annuities, 1031 exchanges, qualified opportunity zones, donor advised funds and more.



A Collaborative Community

Collaboration is a hallmark of the Avantax community, and we provide dozens of ways to learn from your successful peers.

- » Regional Growth Through Community meetings.
- » Rise to Elite coaching program, offered three times per year.
- » Connect for Growth annual workshop.
- » Annual National Conference.
- » Annual Insurance University.
- » Avantax Women Advisor's Forum.
- » Marketing Mastermind group.
- » Avantax Exchange webinars.
- » Peer-led roundtables.



Innovative Growth Support

Our skilled and specialized teams offer unique support to fuel your business growth.

- » Designated growth consultants and elite business strategists.
- » Advisory, alternatives, insurance, annuity and advanced case design specialists.
- » Strategic partnerships program.
- » Succession planning support.
- » Design and administration of employer-sponsored retirement plans.
- » Turnkey marketing execution for qualifying firms.



Industry-Leading Service

Our client service and operations team scored 80% satisfaction in the Winter 2022 Voice of Avantax survey. Financial professionals love our:

- » Multi-channel service request model.
- » Average 45-second response time to calls and chats.
- » Same-day processing of all paperwork in good order.
- » Experienced, licensed service associates where appropriate.
- » Key service point-of-contact for escalation and direct access to Avantax leadership.