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Same Powerful Value Proposition for Accounting Firms

As part of the brand alignment, the in-house retirement offering that was formerly referred to as HK Financial Services Retirement Plan Services will now be referred to as Avantax Retirement Plan Services. It will continue providing full fiduciary ...

Jan. 04, 2021

The logo for Avantax Wealth Management. The word "Avantax" is in a large, bold, dark blue sans-serif font. Below it, the words "Wealth Management" are in a smaller, dark blue sans-serif font, followed by a superscripted "SM" trademark symbol.

HK Financial Services (“HKFS”), a fast-growing, CPA-focused registered investment advisor (“RIA”), has been rebranded Avantax Planning Partners and will operate alongside [Avantax Wealth Management](#). The combined companies offer unique, flexible affiliation models, with the RIA model being particularly attractive to mid-size to large accounting firms.

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- **An independent broker-dealer** for tax and wealth management professionals for whom independence is paramount;
- **Multiple referral models** for tax professionals who prefer a partnership or affiliation model through which their clients' financial planning needs are met; and
- **An employee-based model** serving CPAs and tax professionals by partnering with Avantax's in-house RIA.

“Avantax Planning Partners has allowed us to broaden how Tax and Financial Professionals can affiliate with Avantax, including the in-house RIA model, which is particularly attractive to large accounting firms,” said Avantax Wealth Management President, Todd Mackay. “Flexible affiliation models are core to the Avantax value proposition because they offer powerful ways for us to partner with Tax and Financial Professionals of all sizes, from sole practitioners, to multi-partner CPA firms. Additionally, our multiple affiliation model provides a turnkey solution for our independent Financial Professionals looking to transition their wealth management book of business.”

The new, more tightly aligned branding will not alter the client experience.

“The HKFS business model remains unchanged – as Avantax Planning Partners, we will continue working hand-in-hand with CPAs and tax professionals to provide turnkey wealth management and financial planning services to their clients,” said Louie Rosalez, President of Avantax Planning Partners. “There will be no change in our relationships with our current affiliates or our service to clients. Our team remains laser focused on delivering the high-touch experience clients have come to know, and expect, from us.”

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while also supporting Blucora's growth objectives," said Blucora President and Chief Executive Officer Chris Walters. "The rebranding is an important, public-facing demonstration that our lines of business are tightly aligned. We are confident that our differentiated tax-focused wealth management strategy and market position are compelling for the right Financial Professionals and their customers, and likewise, will support our future growth."

Firm Management

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