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dealer World Equity Group, Inc., and from Retirement Wealth Advisors, LLC, Maestro's former RIA, to benefit from the multiple layers of support Avantax provides, and the wide ...

Apr. 15, 2021

Avantax

Wealth ManagementSM

Avantax, the wealth management business of Blucora, Inc. (NASDAQ: BCOR), a leading provider of technology-enabled, tax-focused financial solutions, welcomes [Maestro Wealth Advisors, LLC](#), an elite firm based in Winston-Salem, North Carolina, with more than \$133 million in total client assets, as of Jan. 13, 2021.

Craig Moser, CFP, CRPC, and Jennifer Moser, MBA, founded Maestro Wealth Advisors with a vision of providing quality, objective financial advice, and a passion for serving their clients.

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have advanced insurance planning capabilities for our clients,” said Craig Moser. “With Avantax resources, we can help clients without setting up everything from scratch ourselves. This lets us deliver Maestro’s real value, which is taking time to sit down with clients, listen to them, and help them make really good decisions about their financial future.”

Moser also looks forward to leveraging the unique community of Avantax Financial Professionals and gaining access to Avantax leadership.

“Being involved in the peer groups is a major benefit for us. Conferences are great, but the real learning is in breakouts when you talk with people and find out something that will be great for your client and great for you. Through Avantax’s peer training initiative we will be able to share best practices and strategies that can benefit our clients as we work through their planning issues,” Moser continued. “It’s exciting to know that we have such deep skills and resources backing us up now, and that includes Avantax leadership. It’s refreshing to have leadership seeking me out rather than me having to chase people down.”

In welcoming Maestro Wealth Advisors, Avantax Wealth Management President Todd Mackay added, “We continue growing our high-quality community of Avantax Financial Professionals by earning the trust and confidence of professionals like Craig and Jennifer Moser. Their success demonstrates the value created by combining tax and financial planning with the empathy needed to help clients make sound financial decisions.”

A commitment to education is central to the success of Maestro Wealth Advisors. Maestro generates significant financial educational content online – ranging from monthly newsletters to market update videos – and offers adult continuing education classes, primarily by partnering with universities.

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