



Avantax Planning Partners Recognizes Affiliate Accomplishments During Largest-ever National Conference

June 16, 2022

Annual Elevate Conference showcases high-performance individuals and firms

DALLAS, June 16, 2022 (GLOBE NEWSWIRE) -- Avantax Planning PartnersSM, an in-house/employee-based RIA (registered investment advisor) that partners with CPA firms to provide clients with holistic financial planning, advisory services and retirement plan solutions, recently hosted its annual Elevate Conference, attended by accounting affiliates, sponsors and Avantax team members. The annual event gives attendees insights, best practices, and strategies to advance and deepen client relationships as it relates to wealth management and financial planning.

"The energy and enthusiasm of our CPA affiliates, sponsors and Avantax team members fueled this year's Elevate conference from beginning to end," said Louie Rosalez, President of Avantax Planning Partners. "The ideas, best practices and strategies we share with our affiliates, coupled with the hard work and dedication our affiliates give clients every day, delivers on the Avantax vision of profoundly impacting client lives by changing the way Americans plan and invest."

This year's conference – themed "Truth. Planning. And the Avantax way" – was conducted May 24 - May 26 in Des Moines, Iowa, and included educational sessions, networking opportunities, sponsor exhibits, and award presentations.

"The attractiveness of the Avantax Planning Partners model shows in the fact that this year's event was the largest Elevate conference ever," said Todd Mackay, President of Avantax Wealth Management[®]. "It was an honor to talk with so many of our accounting affiliates; seeing each other in person helps further deepen partnerships with our longtime partners and new members of the unique Avantax Community."

As part of the annual awards night, the highest-performing Avantax affiliate partners were recognized as part of President's Club, whose winners demonstrate exemplary productivity, client service, communication, planning guidance, and are advocates of Avantax Planning Partners. This year's winners are:

- Todd VanDusen, Brady Martz & Associates, P.C. (Minot, North Dakota)
- Kevin Eggebraaten, CP Financial Services (Rapid City, South Dakota)
- Jeff Knapp, Erpelding, Voigt & Company, LLP (Algona, Iowa)
- Scott Olinger, Harding, Shymanski & Company, P.S.C. (Evansville, Indiana, and Louisville, Kentucky)
- Courtney DeRonde, TDT CPAs & Advisors (West Des Moines, Iowa)
- Wendy Sims of Welgaard Financial Services, Ltd. (Pella, Iowa)
- Eric Jaske, Olympic Financial (Carmel, Indiana)
- Katie Thomas, Honkamp Krueger & Co., P.C. (Dubuque, Iowa)
- Ebony Rahe, Williams & Company Financial Services, LLC (Spencer, Iowa)
- Erin Spiwak, James Moore & Co. (Gainesville, Florida)

In addition to recognizing top wealth advisory firms, other awards included:

Consistency Award

CP Financial Services and Erpelding Voigt and Company won this year's Consistency award, which goes to a firm demonstrating an ability to continuously execute on delivering on its commitment to serving as clients' most trusted advisor, always looking at a holistic approach to wealth management.

Best Practices Firm Award

Harding Shymanski & Company won the Best Practices Firm award, which goes to an Avantax Planning Partners firm exhibiting a strong commitment to following Avantax Planning Partners' strategies, along with consistent execution and accountability.

Top Champion Award

The Top Champion award recognizing Avantax Planning Partners' top affiliates that exhibit leadership in planning and wealth management, was won this year by Perry Mattson of Brady Martz & Associates, and Eric Jaske of Olympic Financial.

Firm of the Year

The Firm of the Year leads Avantax Planning Partners in productivity, client service, communication, planning guidance, and are truly advocates of Avantax. Brady Martz was recognized as Firm of the Year.

Difference Maker Award

The Difference Maker Award is given to a firm and/or individual who has demonstrated that their approach to financial planning and wealth management made a significant difference in the lives of their clients. This year's Difference Maker award was claimed by the partner group at Evans, Harville, Atwell & Company, in addition to Avantax Planning Partners team members Kelly Adams, Chris Dick, and Laura Patterson. Together, this team came together in a time of personal tragedy to truly help clients, and each other.

About Avantax Planning PartnersSM

Avantax Planning PartnersSM is a national financial planning and wealth management firm that partners with CPA firms to combine and deliver holistic

financial and tax-planning services to their clients. Using the Guidance Planning Strategies planning tool, Avantax Planning Partners visually lays out a long-term plan, considering a wide array of financial decisions and their potential impacts on clients' financial health. Through this unique and proven approach, Avantax Planning Partners and CPA firms help clients make progress toward their financial goals through strategies such as asset management, estate planning, retirement planning, tax planning, risk management and more. The wealth management segment of Blucora, Inc. (NASDAQ: BCOR), which includes the Avantax Planning PartnersSM and Avantax Wealth Management[®] brands, had a collective \$86 billion in total client assets as of March 31, 2022. For more information, please visit us at www.avantax.com or on [LinkedIn](#) and [Facebook](#).

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