



Avantax Appoints Melissa Loner as Chief Compliance Officer

February 8, 2023

DALLAS, Feb. 08, 2023 (GLOBE NEWSWIRE) -- Avantax®, a leader in tax-focused financial planning, today announced the appointment of Melissa Loner, AIF® as Vice President and Chief Compliance Officer.

With more than 25 years of experience in the financial services industry, Loner has worked as a financial planner in addition to numerous corporate leadership roles. She has spent a significant portion of her career in the Home Office of various independent firms, working in due diligence, marketing, transitions, operations, supervision, compliance, and fiduciary services.

"I am pleased to welcome Melissa who joins an energized Avantax leadership team committed to creating value for our Financial Professionals, CPA firms, Home Office staff, and investors," said Chris Walters, CEO of Avantax, Inc. "Melissa's extensive experience with advisory services and the broker-dealer space positions her well to support our Financial Professionals' operations and adherence to regulatory policies and procedures."

Loner joins Avantax from Premier Wealth Management® where she was Executive Vice President, Advisor Services; previously, Loner was Vice President, Fiduciary Services and RIA Chief Compliance Officer, for Cambridge Investment Research, Inc.

In addition to earning an MBA from American Military University, Loner holds FINRA Series 4, 6, 7, 24, 53, 63, 65 licenses, as well as an AIF® designation. She is a member and on the Board of Director (2023 Chair-Elect) of the National Society of Compliance Professionals (NSCP), a member of the Women in Insurance and Financial Services (WIFS), and a member of NAIFA and the Financial Services Institute (FSI).

About Avantax®

Avantax, Inc. (NASDAQ: AVTA) delivers tax-focused wealth management solutions for Financial Professionals, tax professionals and CPA firms, supporting our goal of minimizing clients' tax burdens through comprehensive tax-focused financial planning. We have two distinct, but related, models within our business: the independent Financial Professional model and the employee-based model. We refer to our independent Financial Professional model as Avantax Wealth Management®. Avantax Wealth Management offers services through its registered broker-dealer, registered investment advisor (RIA), and insurance agency subsidiaries and is a leading U.S. tax-focused independent broker-dealer that works with a nationwide network of Financial Professionals operating as independent contractors. We refer to our employee-based model as Avantax Planning PartnersSM. Avantax Planning Partners offers services through its RIA and insurance agency by partnering with CPA firms to provide their consumer and small-business clients with holistic financial planning and advisory services. Collectively, we had \$73 billion in total client assets as of September 30, 2022. For additional information, please visit us at www.avantax.com or www.investors.avantax.com.

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