



## Avantax Welcomes Walter Pardo and His New Jersey-based Wealth Financial Partners Team

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**A successful and growth-minded financial advisor, Pardo chose Avantax for its tax-focused approach to wealth management, specialized Home Office support teams, and deep network of CPAs and tax professionals**

DALLAS, May 03, 2023 (GLOBE NEWSWIRE) -- [Avantax®](#), a leader in tax-focused financial planning, welcomes Walter "Wally" Pardo, CWS®, PPC™ and his New Jersey-based Wealth Financial Partners LLC team. Pardo is looking to Avantax for new growth opportunities, including the ability to expand services and investment expertise with the support of Avantax's Home Office specialists, as part of Pardo's commitment to the marriage of tax and financial planning.

"From the beginning, the language I heard from Avantax was all about tax mitigation and proactive tax planning on behalf of clients, which is my world already, so that was incredibly important," said Pardo, CEO of Wealth Financial Partners. "There aren't many broker-dealers that embrace tax like Avantax does, and I like that they're standing behind their tax strategy and that they proactively take that tax-focused approach to their advisors in a very positive way."

Pardo also cited Avantax's teams of specialists supporting Financial Professionals from the Home Office, including Advanced Case Solutions and Financial Planning, the Annuities team, and Transition Services.

"It's a game-changer to have people like Avantax's advanced planning team on your side because they can deliver expertise that I might not have, and that creates value for my clients, and nothing's more important to me than that," Pardo said. "I've always been a life-long learner, and I'm looking forward to working with Avantax to add even more ways of delivering value to my clients. My firm and I have already found success despite not having all the resources now available to us from Avantax, or being part of a close-knit community of like-minded advisors like at Avantax, so I'm really excited about our future."

Pardo transferred to Avantax being affiliated with Independent Financial Group for nine years. He was referred by a current Avantax Financial Professional.

"The greatest compliment we can receive is when a current Financial Professional refers a peer to us, and we couldn't be happier to welcome Wally and his team to Avantax," said Laurie Stack, VP, Business Development at Avantax. "Wally is absolutely cut from the same cloth as Avantax and our community of terrific Financial Professionals because he's committed to tax-focused planning, he wants to present the broadest universe of opportunities to clients, and without fail, Wally always puts the client first, and that fits right in with Avantax."

Tax and Financial Professionals can learn more about Avantax by [clicking here](#).

### **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 Partners<sup>SM</sup>. 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 \$76.9 billion in total client assets as of Dec. 31, 2022. For additional information, please visit us at [www.avantax.com](http://www.avantax.com) or [www.investors.avantax.com](http://www.investors.avantax.com). You can also find us on [LinkedIn](#).

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