



HD Vest

Generating millions of dollars of potential new revenue

Company profile:

HQ: Irving, TX
350 employees

AUM: \$37B

Overview: HD Vest offers tax and other financial planning consultations to customers.

\$159M

Potential net new AUM from generating 607 additional investment plans with Seismic

HD Vest was using a manual process to create and personalize each investment plan to deliver to clients. One team member was dedicated to this redundant, error-prone task. Compiling and inserting important information into every piece of content was overwhelming for just one person and ultimately stunted HD Vest's growth.

By adopting Seismic, HD Vest automates content to accelerate the investment plan creation process and improves the effectiveness of each plan with personalization. Content is personalized for each client based on a risk profile scoring system that lives as a data source in Excel that is flowed into preformatted templates using Seismic's LiveDocs® technology. This automated process amplifies the number of investment plans HD Vest can produce.

HD Vest has generated 607 additional investment plans with the potential to capture \$159M in net new AUM.