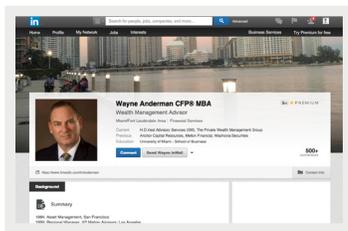


## HD VEST

HD Vest Financial Services is a leading financial services company that provides financial planning and business solutions through an independent network of over 4,600 registered reps and financial advisors, most of which are tax professionals and accountants.

### HD VEST FINANCIAL SERVICES®



Wayne Anderman - HD Vest



“We were late bloomers to the market on the social front for financial advisors, and what Hearsay Social has helped us do is leapfrog and really do a quick four-year catch up.”

—**Ruth Papazian, Chief Marketing Officer and Head of Business Development**

“Social media still offers a competitive advantage for those who use it the right way, but my best guess is that, as the adoption rate increases, that advantage will become a necessity, not a differentiator.”

—**Wayne Anderman, Managing Partner at The Private Wealth Management Group**

### CHALLENGE

HD Vest Financial Services felt it was falling behind the rest of their competition in offering their advisors a complete social solution to connect, engage and share on social media. At a minimum, the solution they sought had to meet compliance needs and regulatory requirements as well as provide a seamless user experience to leverage the power of social. However, in order to ensure adoption and growth, it also needed to outperform their previous provider by offering a better integration process and a positive return for their efforts.

With Hearsay Social, HD Vest wanted to tackle these three key challenges:

- Adoption of Hearsay Social by the 50 advisors who had been using the previous provider and stalled in a perpetual pilot program
- Ensure their compliance needs and regulatory requirements were met throughout the implementation process
- Provide their advisors a platform to leverage the power of social media and illustrate a positive return for their efforts

### SOLUTION

HD Vest partnered with Hearsay Social in order to improve the advisor experience while ensuring compliance tools and regulatory requirements were in place. With Hearsay Social, HD Vest migrated everyone from their previous provider and offered a better and more intuitive user experience.

### RESULTS

HD Vest successfully on-boarded 650 independent advisors on Hearsay Social and are seeing positive results from advisors and their home office teams.

- Hearsay Social provides advisors the necessary tools and insights to leverage social media to grow their business
- Hearsay Social’s Social Business Maturity Model has been invaluable to their implementation and provides a validated ROI to their advisors
- The support and best practices the firm received from Hearsay Social has quickly brought them up to speed with other financial services industry leaders
- A strong level of support and a true strategic partnership gave HD Vest the confidence to use Hearsay Social at the corporate level as well