

Moorman, Harting & Company

Moorman, Harting Financial Services, Ltd.

Certified Public Accountants - Financial Advisors

Firm News – December 2019

Moorman, Harting Financial Services, Ltd. Honored as a Top Wealth Management Firm by Avantax Wealth ManagementSM



*Alan E. Wolters, James W. Harting, Sara A. Kiser
Jenny L. Gaerke, Mary Jane Koesters, Douglas M. Bertke
Accepting the Six Diamond Eagle award on behalf of the firm*

Moorman, Harting Financial Services, Ltd., with offices in Coldwater and Celina, OH, was recognized for its extraordinary achievements throughout the year at the 2019 National Conference that took place from Nov. 10–12 in Austin Texas. Moorman, Harting Financial Services, Ltd., was named a six Diamond Eagle, which is awarded to firms based on the criterion of the firm’s production volume across all product lines.

“Diamond Eagle firms set themselves apart from the crowd because of their unwavering commitment to providing tax-focused investment strategies that help their client’s accomplish their goals,” Avantax Wealth Management President Enrique Vasquez said. “Their dedication to providing a new standard of heightened value to the individuals, families and businesses they serve establishes an industry precedent for others to follow.”

Avantax Wealth Management is pleased to congratulate Moorman, Harting Financial Services, Ltd., for reaching six Diamond Eagle status, deeply appreciates Moorman, Harting Financial Services, Ltd. devotion to serving its clients through comprehensive financial planning advice and commends Moorman, Harting Financial Services, Ltd., on its continued progress and accomplishments.

The theme of National Conference 2019 was “One Giant Leap,” and discussed the importance of achieving long-term success through many steps in the disciplined, consistent pursuit of a goal. Diamond Eagle firms live out this philosophy every day in their offices as they work to deliver an extraordinary client experience through exceptional service to help their client’s work toward desired outcomes.

Avantax Wealth Management curated a group of key industry-leading speakers to share their experiences and insights on significant trends that drive markets and the opportunities created by them. Speakers included Michael Kitces, co-founder of the XY Planning Network and editor of Kitces.com; Peter Zeihan, geopolitical strategist; Kindra Hall, “New York Times” bestselling author, researcher and storyteller; Bill Crager, interim CEO of Envestnet; Bill Cass, CFP®, CPWA®, director of wealth management programs at Putnam Investments; Lee Frederiksen, Ph.D., managing partner at Hinge Marketing; and Molly Fletcher, author and coach.

About Avantax Wealth ManagementSM

Avantax Wealth ManagementSM (which comprises Blucora’s Wealth Management business and includes HD Vest and 1st Global) offers a tax-advantaged approach for comprehensive financial planning. Through its Tax-Smart approach, Avantax helps clients leverage taxes to create financial growth opportunities. Most financial companies treat taxes as an afterthought, or not at all, even though taxes are one of life’s most complex and costly expenses. Avantax uses technology, tax and wealth management insights to uncover tailored and advantageous opportunities across our clients’ financial lifecycles to deliver optimal returns.



The Award Winning Firm

Financial Advisors

**Douglas M. Bertke, James W. Harting, Mandy M. Homan, Randall L. Kaup
Daniel J. Koesters, Renee L. Knoth, Mary Jane Koesters, Alan E. Wolters**

Securities offered through Avantax Investment ServicesSM, Member FINRA, SIPC.

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