

**FOR IMMEDIATE RELEASE**

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**RICHARD OGG RECOGNIZED  
AS A FIELD LEADER BY HD VEST FINANCIAL SERVICES®**

**Annual Event Brings Together HD Vest's Top Field Leaders from Across the Nation**

11 May 2017, Santa Rosa, CA — Richard Ogg, a financial services professional in Santa Rosa, has been recognized as a Field Leader by HD Vest Financial Services®. Richard attended the *2017 Field Leader Conference*, which was hosted at Four Seasons Dallas at Las Colinas, Texas, May 8-10.

Headquartered in the greater Dallas, Texas, area, HD Vest is a leading independent broker-dealer empowering holistic tax and wealth management-based financial advice through leading independent advisors across the country.

The annual Field Leader Conference honors Chapter Directors and Mentors who guide other financial advisors as they grow in the industry. The HD Vest Chapter Program offers a unique opportunity for HD Vest Advisors to network with other HD Vest Advisors and receive valuable training to grow their investment planning practices, guided by encouraging regional Chapter Directors. The Mentor Program is designed to provide one-on-one personalized guidance in goal setting and sales presentation skills for Protégé Advisors who are new to HD Vest and/or financial services, guided by experienced Mentor Advisors.

As part of the annual Field Leaders Conference, Richard joined with other leading HD Vest-affiliated Advisors in educational meetings and networking events. Richard said, "It was an honor to attend the Field Leader Conference. I found the event to be a great resource for networking with peers from around the country and to meet firsthand with HD Vest executives, while also learning from industry experts in the field."

Scott Rawlins, President of HD Vest, said, "Every year I look forward to our Field Leader Conference and the opportunity to meet with our Advisors and personally congratulate them. Their ongoing commitment to their clients and to their profession truly sets them apart. Their excellence in client service is an inspiration for other Advisors in our firm, and indeed, throughout the financial industry."

Richard Ogg has been an Advisor with HD Vest since 2008. He has owned The Master's Tax & Financial Services, in Santa Rosa, since 2005. Richard became an Enrolled Agent in 2006 and received the Certified Fund Specialist designation in 2014. Richard added the National Social Security Advisor credential in 2015.

Richard serves the needs of individuals, corporations, partnerships, trusts, estates and foundations providing traditional brokerage accounts, fee-based managed accounts, individual and business retirement plans, education planning, stocks, bonds, mutual funds, life, disability and long-term-care insurance, variable and fixed annuities, multigenerational estate planning, comprehensive tax reporting, online account access, account consolidation and systematic investment plans.

## **About HD Vest Financial Services**

Since its inception in 1983, HD Vest Financial Services® has supported an independent network of tax and non-tax professionals who provide comprehensive financial services including securities, insurance, money management services, and banking solutions. Ranked as one of the top 15 independent broker-dealer firms,<sup>1</sup> we have over 4,400 independent contractors, who manage over \$39 billion in assets for individuals, families and small businesses in all 50 states.<sup>2</sup>

<sup>1</sup>Think Advisor *2016 Broker-Dealer Reference Guide*, which measured/ranked the top 25 independent broker-dealers by annual revenue.

<sup>2</sup>As of January 1, 2017

HD Vest Financial Services® is the holding company for the group of companies providing financial services under the HD Vest name.

Securities offered through HD Vest Investment Services<sup>SM</sup>, Member SIPC

Advisory services offered through HD Vest Advisory Services<sup>SM</sup>

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The Master's Tax & Financial Services is not a registered broker/dealer or registered investment advisory firm.

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