

## **TaxStatus Named Industry Disruptor at the 2026 Wealth Management Industry Awards**

**DALLAS, TEXAS** (September 30, 2026) — TaxStatus, the leading provider of IRS-sourced financial data for financial advisors and CPAs, has been recognized as the winner of the Industry Disruptor in the 2026 Wealth Management Industry Award (the "Wealthies") for their Verified Financials solution. The award recognizes how disruption is changing how advisors work with clients, invest, and gather. This was the firm's first year submitting their products and services for the Wealth Management Industry Awards.

Selected as the best of the best by Wealth Management's judges, Verified Financials stood out for its unique value proposition to advisors. The TaxStatus team sought to eliminate the friction for advisors in obtaining tax data, while also providing them with continuous IRS account monitoring, as well as insights and data necessary to provide improved tax and financial planning recommendations.

"We're honored to receive this prestigious award from Wealth Management," said Kevin Knull, CFP®, CEO of TaxStatus. "Verified Financials has changed the game for advisors. They're no longer working with incomplete data, and are able to deliver holistic, more proactive advice at scale."

Verified Financials connects directly to the IRS to pull verified financial information, analyzing over 3,000 data points per taxpayer to uncover held-away assets, business ownership, real estate holdings, retirement accounts, and other financial details that advisors typically spend hours trying to collect. The platform then monitors clients' IRS accounts in real-time for three years, alerting advisors to tax liabilities, refunds, audits, or filing discrepancies before clients receive official notices from the IRS.

Now in its 12th year, the Wealth Management Industry Awards recognize outstanding achievements by companies, organizations and individuals that support financial advisor success. Winners are selected based on quantitative measures including scope, scale, adoption and feature set, along with qualitative measures such as innovation, creativity and user experience.

A record-breaking number of nominations were submitted in 2026, with over 1,392 entries received from 315 unique companies. "The growth of the Wealthies reflects both the expanding range of organizations serving advisors and the extraordinary amount of work being done to help advisors build stronger businesses and improve outcomes for their clients," said David Armstrong, Head of Editorial Operations, Wealth Management Group. "Our independent judges evaluate the usefulness, innovation, scope and impact of each initiative - not the company behind it. To be named a finalist, and especially a winner, is meaningful recognition in a year with a record field."

A complete list of the 2026 Wealth Management Industry Awards winners and finalists can be found at <https://informaconnect.com/wealth-management-industry-awards/>.

### **About TaxStatus**

TaxStatus is the industry's leading provider of IRS-sourced financial data for financial advisors, RIAs, broker-dealers, custodians, CPAs, financial institutions, and fintech firms. Through its Verified Financials platform, TaxStatus retrieves official tax and financial data directly from the IRS system of record, giving professionals the most accurate and comprehensive view of their clients' financial lives. For more information, visit [taxstatus.com](https://taxstatus.com).

### **About Wealth Management**

Wealth Management, an Informa business, provides everything wealth professionals need to know to stay knowledgeable about the industry, build stronger relationships, improve their practice, and grow their business. Wealth Management offers financial services organizations a broad array of marketing services designed to help them influence the industry's leading audience of wealth management professionals.

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