

# NEWS

For Immediate Release

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## Advyzon Achieves High Ratings and Significant Increase in Market Share in 2022 T3 / Inside Information Software Survey

*In addition, comprehensive technology platform adds new Vice President of Key Accounts*

**CHICAGO, IL (May 13, 2022)** – [Advyzon](#), a comprehensive technology platform and portfolio management solution for financial advisors and investment managers, recently achieved high client satisfaction ratings and showed significant increase in market share across multiple categories in the [2022 T3 / Inside Information Software Survey](#). The results of the annual technology survey and report, produced by [Joel Bruckenstein of T3 Technology Tools for Today](#) and [Bob Veres of Inside Information](#), were unveiled and presented live at the recent [T3 Advisor Conference](#), which took place May 2<sup>nd</sup> – 4<sup>th</sup> in Denton, Texas and saw nearly 1,000 total attendees.

“We’re thrilled to yet again score top marks in this prestigious, industry-leading survey and report,” said John Mackowiak, Chief Business Development Officer at Advyzon. “It’s an honor to see that our clients are highly satisfied with our platform and our offerings, and extremely encouraging to see our continued growth in market share in the industry.”

**The report dubbed client satisfaction ratings higher than 8 “extraordinary” in its summary findings:**

- Advyzon received the highest client satisfaction rating (8.33) in the All-in-One Software category for firms with more than a 0.1% market share – a feat they have now accomplished for the past five years (every year since 2018)
- Advyzon scored the highest client satisfaction rating (8.49) in the Portfolio Management/Reporting Tools category for firms with more than 0.4% market share
- Advyzon received the second-best overall client satisfaction rating (8.18) in the CRM category
- While not traditionally considered as a Financial Planning Software, Advyzon received a 7.38 rating in the Financial Planning Software category

## **Advyzon also showed significant growth in market share within all of these categories:**

- Grew from 1.60% to 3.56% in the All-In-One Software category (fourth overall)
- Grew from 1.86% to 3.80% in the Portfolio Management/Reporting Tools category (sixth overall)
- Grew from 1.66% to 4.25% in the CRM category (fifth overall)
- Grew from 0.99% to 1.54% in the Financial Planning Software category (tenth overall)
- Also named often in ‘Programs Respondents Are Considering’ within these categories, and was listed among ‘Other Programs Mentioned’ in multiple other categories

Thanks to their stellar ratings, Advyzon was dubbed a “Software All Star” – solutions that finished in the top five of their categories in market penetration and also achieved an extraordinary (8.0+) average user rating – receiving a user rating of 8.33 while ranking fourth in market share in the All-In-One Software category, and a user rating of 8.18 while ranking fifth in market share in the CRM category. Only six other firms besides Advyzon qualified for the “Software All Star” list more than once.

In addition, Advyzon joined an elite group of companies that “should be on any software buyer’s radar” dubbed “Mighty Mites” – solutions with over a 1% market share that achieved an extraordinary (8.0+) average user rating (All-In-One Software, CRM, and Portfolio Management/Reporting Tools). Only one other firm besides Advyzon was named to the “Mighty Mites” list more than once (with Advyzon being named three times).

## **ADVYZON WINS BY LISTENING TO ADVISORS**

While Advyzon routinely receives high ratings in the T3 / Inside Information Software Survey, the 2022 report acknowledged the great strides Advyzon made in 2021 to improve its offerings to advisors – an effort that was driven by advisor feedback at every stage of development.

“Advyzon was held back [previously] by the lack of a managed account platform and a robust rebalancing tool, but it now has both, and both are home-grown,” the report notes, referencing [Advyzon Quantum®](#), the robust rebalancer Advyzon officially launched in April 2022, as well as [Advyzon Investment Management \(AIM\)](#), a comprehensive turnkey asset management program (TAMP) fully integrated into Advyzon’s cloud-based platform, announced in March 2022.

The accolades for Advyzon come on the heels of equally high praise from the 2021 Kites Technology Report – [The Technology That Independent Financial Advisors Actually Use \(And Like\)](#) – which also singled Advyzon out for its upward trajectory as both a CRM and portfolio reporting and management tool.

Advyzon’s cloud-based platform combines portfolio management, customizable performance reporting, trading and rebalancing, client web portals, client relationship management (CRM), client billing, and document storage, making it easy for advisors to run their financial planning and investment advisory firms while managing their client accounts with efficiency and ease. Advyzon is currently serving over 1,100 advisory firms.

To see the full T3 / Inside Information Software Survey results, which Advyzon was also proud to be a sponsor of, [please click here](#).

## **ADVYZON ADDS NEW VICE PRESIDENT OF KEY ACCOUNTS**

Advyzon recently announced the addition of a new team member, bringing on [Ashleigh Boone](#) as Vice President of Key Accounts. Boone will serve as a senior salesperson for the firm, focusing on large opportunities and priority accounts.

Before joining Advyzon, Boone spent nearly 8 years with Riskalyze, a financial technology company that provides software as a service to financial advisors, as a Senior Account Executive and client relationship manager. Prior to that, Boone held multiple roles as a Business Development and Event Manager, as well as an Advertising Consultant.

“We’re very excited to welcome Ashleigh to the Advyzon team,” said Mackowiak. “She has an extensive background in fintech, the financial services industry, and in business development roles, so she’s the perfect fit for our firm.”

## **ABOUT ADVYZON**

Advyzon provides comprehensive, intuitive, cloud-based, wealth management technology for independent financial advisors and registered investment advisors (RIAs). The Advyzon tech platform combines portfolio management, customizable performance reporting, trading and rebalancing, client web portals, client relationship management (CRM), client billing, and document storage. A team of entrepreneurs led by CEO Hailin Li, Ph.D., CFA®, Advyzon strives to innovate in strategic and useful ways. Financial advisors inspire their innovation and integrations, and their exceptional technology and unmatched service exist to improve the advisor experience – whether it’s via portfolio and firm management or client relationships and growth. To learn more about Advyzon, visit [www.Advyzon.com](http://www.Advyzon.com).

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