NEWS
For Immediate Release

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Advyzon Announces New Custody and Retail Investment Infrastructure Integration with Apex Advisor Solutions

Native integration pushes the boundaries of advisor and custodial technology

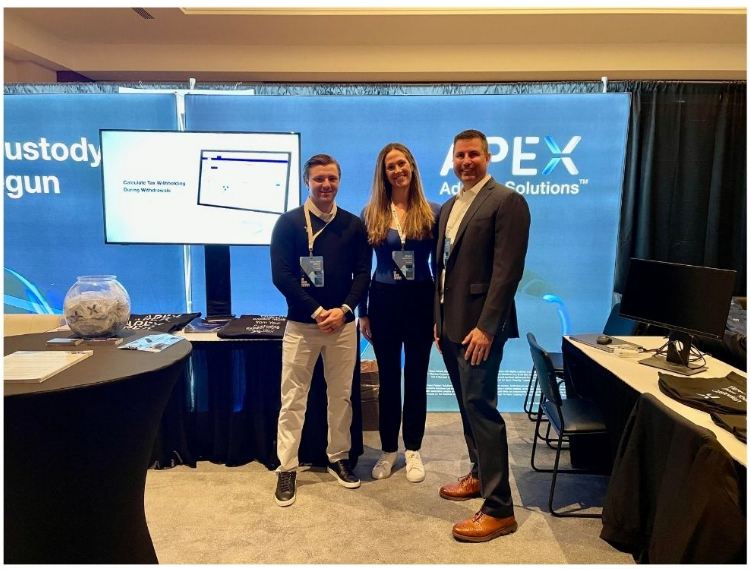
PHOENIX, AZ (February 22, 2024) – Advyzon, a comprehensive service and technology platform and portfolio management solution for financial advisors and investment managers, today announced a new custody and retail investment infrastructure integration with Apex Advisor Solutions, a division of Apex Fintech Solutions Inc. (Apex) that empowers the future of wealth management with digital custody and clearing provided through Apex Clearing Corporation. The collaboration was announced during the inaugural Advyzon Conference, taking place February 20-22, 2024 in Phoenix, Arizona. Apex is also attending, sponsoring, and exhibiting at the conference, and will participate in a Custodial Technology Panel happening today at 8:55am PST.

Registered Investment Advisors (RIAs) use Apex's robust custody and clearing platform and capital structure to administer their client investment accounts, from real-time onboarding and account funding, to custody, trading, clearing, and cost basis and tax reporting. Now, they can harness the power of Advyzon's comprehensive, award-winning technology platform for advisors. The integration includes new account opening workflows, initial account funding, money movement, custodian fee file submission, and FIX trading.

"At Apex, we're laser-focused on boosting RIA efficiency," explained Olivia Eisinger, GM of Advisory at Apex Fintech Solutions. "Our straight-through processing helps cut through the clutter by allowing operational processes like account opening and funding to be accomplished in a streamlined workflow. No more jumping through hoops and disparate steps – it's seamless and real-time. Secondly, advisors can initiate operational processes directly within Advyzon, a technology deeply integrated within the Apex Astra ecosystem, saving precious time and reducing frustrating system and context switching."

Advyzon"s cloud-based platform for financial advisors combines portfolio management, customizable performance reporting, trading and rebalancing, client web portals, client relationship management (CRM), client billing, and document storage – plus a model marketplace with access to third party strategists and/or turnkey asset management via Advyzon Investment Management (AIM). This comprehensive solution makes it easier for advisors to run their financial planning and investment advisory firms while managing their client accounts with efficiency. Advyzon is currently serving over 1,500 advisory firms.

"We're very excited about our collaboration with Apex and have really enjoyed working with their team throughout the course of building out the integration," said John Mackowiak, Chief Revenue Officer at Advyzon. "We expect that a lot of what they're doing is going to be well received within the industry and is cutting edge from an integration perspective. I think some of the things that they're bringing to market are going to push custodial integrations to the next level."



McAllister Green and Megan Hausmann of Apex
and John Mackowiak of Advyzon celebrating
the integration announcement while
at The Advyzon Conference in Phoenix

PUSHING THE BOUNDARIES OF ADVISOR AND CUSTODIAL TECHNOLOGY

Advisors using Apex and Advyzon are now enabled with efficient workflows for opening new accounts: when an advisor initiates the process to open a new account, all information saved for the client relevant to the application will be prefilled on the form. The advisor can then send the form to the client to complete, review, and sign on a client web portal.

The initial account funding process can be completed by the client in their client portal once the advisor submits their new account application. The integration supports two funding methods: Automated Customer Account Transfer (ACAT) and Automated Clearing House network (ACH).

The integration can also simplify money movements, including deposits and withdrawals for Apex accounts. This process is led by the advisor, but the client can view deposits and withdrawals in their client portal.

The integration is designed to simplify custodian fee file submissions by allowing users to directly submit the Billing Fee File from Advyzon via API, eliminating the need to download and then upload to the custodian.

Finally, the integration supports Financial Information eXchange (FIX) trading, which has become the standard electronic protocol for pre-trade communications and trade execution, as well as for U.S. regulatory reporting.

ABOUT ADVYZON

Advyzon provides comprehensive, intuitive, cloud-based wealth management technology and investment management services 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, along with investment management services and a model marketplace offered by Advyzon Investment Management, LLC. A team of entrepreneurs led by CEO Hailin Li, Ph.D., CFA®, Advyzon strives to innovate in strategic and useful ways. Financial advisors inspire Advyzon's innovation and integrations. 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. To learn more about Advyzon Investment Management, visit www.AdvyzonIM.com.

ABOUT APEX ADVISOR SOLUTIONS

Apex Advisor Solutions powers the future of wealth management with digital custody and clearing provided through Apex Clearing Corporation. Apex Astra is the custodial UI and advisor-centric product suite on top of Apex Clearing Corporation's operationally efficient API suite used by fintech leaders for over a decade. Apex Advisor Solutions is a division of Apex Fintech Solutions Inc. Apex Clearing Corporation, a wholly-owned subsidiary of Apex Fintech Solutions Inc., is an SEC registered broker dealer, a member of FINRA and SIPC, and is licensed in 53 states and territories. Securities products and services referenced herein are provided by Apex Clearing Corporation. FINRA BrokerCheck reports for Apex Clearing Corporation are available at: http://www.finra.org/brokercheck.

ABOUT APEX FINTECH SOLUTIONS

Apex Fintech Solutions is a fintech powerhouse enabling seamless access and frictionless investing. Apex's omni-suite of scalable solutions fuel innovation and evolution for hundreds of today's market leaders, challengers, change makers, and visionaries. The Company's digital ecosystem creates an environment where clients with the biggest ideas are empowered to change the world. Apex works to ensure their partners succeed on the frontlines of the industry via bespoke custody and clearing, advisory, institutional, digital assets, and SaaS solutions through its Apex Clearing™, Apex Advisor Solutions™, Apex Silver™, and Apex CODA Markets™ brands. For more information, visit the Apex Fintech Solutions website: www.ApexFintechSolutions.com.