

NEWS

For Immediate Release

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Advyzon Investment Management (AIM) Launches Model Marketplace, ‘Nucleus’

*Announced at the T3 Advisor Conference, Advyzon’s TAMP
now offers both advisor-traded and Advyzon-traded options*

CHICAGO, IL (March 14, 2023) – [Advyzon Investment Management](#) (AIM), a turnkey asset management program (TAMP) under the [Advyzon](#) umbrella, announced while at the [T3 Technology Tools for Today conference](#) being held in Tampa yesterday that they are launching their new model marketplace called Nucleus. Nucleus will be fully integrated into the comprehensive, award-winning Advyzon platform built on single source code.

“We’re extremely excited to announce the launch of Nucleus, something that has been in the works since we launched AIM in Spring 2022,” said Lee Andreatta, CEO and co-founder of Advyzon Investment Management. “Adding a model marketplace enhances AIM’s TAMP offering and moves Advyzon closer than ever to offering a fully comprehensive solution for financial advisors and investment managers to run their firms.”

Andreatta and colleague John Mackowiak, Chief Revenue Officer for Advyzon, shared the news during their T3 main stage session, ‘If You Think Your Tech Stack Is Optimized, Think Again: The Benefits of a Comprehensive Solution’. Mackowiak’s key message was that building a good tech stack is harder than most financial advisors think – and that once they get into the thick of it, they may be not only frustrated but disappointed with the end result.

The Nucleus model marketplace is structured for unified managed accounts (UMAs) and will include sleeve-level reporting and trading. Advisors will have access to third-party strategists offered in two ways to help their businesses:

- Advyzon traded, with advisor built UMAs or pre-set UMA portfolios built by AIM incorporating strategist sleeves
- Advisor traded, with Nucleus access available in [Advyzon’s Quantum Rebalancer](#) – a powerful, in-house trading and rebalancing tool seamlessly integrated into Advyzon’s cloud-based platform

Initially, users will have access to over 100 risk-based models and SMAs from some of the top third-party management firms in the industry.

Single and multi-sleeve setup and trading will include a variety of features, including cash management, dollar-cost averaging (DCA) and required minimum distribution (RMD) schedules, a 'Do Not Buy/Sell' securities list, equivalencies, carve outs, location optimization, maximum annual cap gain limit, onboarding tax management and ongoing tax loss harvesting, and wash sale alerts. AIM plans to add to Nucleus' features and capabilities in the coming months.

To learn more about the Nucleus model marketplace by Advyzon Investment Management, [please click here](#).

ADVYZON INVESTMENT MANAGEMENT EMPOWERS ADVISORS TO WORK ON THEIR BUSINESS, NOT IN IT

Advyzon Investment Management, which launched in March of 2022, was created to allow financial advisors to be more efficient via a better integrated user experience by providing TAMP services conveniently within Advyzon's single source code platform. AIM's managed portfolio solutions and high touch service model allow advisors to achieve operational efficiencies along with best-in-class investment selection and modeling, while empowering them to work on their business, not in it.

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 – plus a model marketplace with access to third party strategists via turnkey asset management with AIM – making it easy for advisors to run their financial planning and investment advisory firms while managing their client accounts with efficiency and ease. Over the years, the Advyzon team began to see that advisors wanted additional, comprehensive options for asset management solutions without having to look outside of Advyzon's comprehensive platform. Therefore, creating a TAMP was a natural evolution for Advyzon.

AIM offers risk-based models including active/passive mutual funds and ETFs, a tax-sensitive ETF only solution, an ESG active/passive model, an alternative model, and direct indexing, as well as tools and methodologies around tax optimization and tax loss harvesting. The firm has continued to build out additional investment products around all of these core offerings, as well as offer new strategies, as they've evolved over the course of their first year in business.

In addition to their investment offering, AIM provides a personalized service model to advisors based on their philosophy of insourcing versus outsourcing. AIM's service team members are personally assigned to individual advisors and take the time to truly understand their businesses, doing the heavy lifting on the whole lifecycle of an account including account opening, billing, reporting, trading, data reconciliation, and acting as a custodial liaison.

To learn more about Advyzon Investment Management, [please click here](#).

ABOUT ADVYZON AND ADVYZON INVESTMENT MANAGEMENT

Advyzon provides comprehensive, intuitive, cloud-based, wealth management technology for independent financial advisors and registered investment advisors (RIAs). The Advyzon tech

platform combines Advyzon Investment Management's turnkey asset management program (TAMP) with portfolio management, customizable performance reporting, trading and rebalancing, client web portals, client relationship management (CRM), client billing, and document storage. AIM's managed portfolio solutions and high touch service model empowers financial advisors to achieve operational efficiencies along with best-in-class investment selection and modeling. To learn more about Advyzon, visit www.Advyzon.com. To learn more about Advyzon Investment Management, visit www.AdvyzonIM.com.

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