

## NEWS

For Immediate Release

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# Advyzon Named Finalist for ‘Digital Innovation’ in 2022 Money Management Institute / Barron’s Industry Awards

*Comprehensive technology platform also makes Inc. 5000 list for second consecutive year*

**CHICAGO, IL (October 19, 2022)** – [Advyzon](#), a comprehensive technology platform and portfolio management solution for financial advisors and investment managers, has been named a finalist in the [2022 MMI/Barron’s Industry Awards](#), an annual competition and industry-leading awards program that recognizes innovation and leadership in the investment advisory solutions industry, voted on by members of the [Money Management Institute \(MMI\)](#).

Advyzon was named a finalist in the ‘Digital Innovation’ category thanks to their comprehensive technology platform and [Advyzon Quantum®](#), their robust rebalancer that officially launched in April 2022. The ‘Digital Innovation’ category honors a new technological innovation (or specific enhancement to an existing platform or tool) that enhances the investor or advisor experience with investment advisory solutions.

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 nearly 1,200 advisory firms.

“We’re very excited to be named a finalist in the MMI/Barron’s Industry Awards,” said John Mackowiak, Chief Business Development Officer at Advyzon. “This recognition from MMI members reinforces all of our hard work on the enhancements we continually make to our platform in order to best serve our advisors and their clients.”

The accolades come on the heels of Advyzon recently achieving top marks and high client satisfaction ratings across multiple categories in the [2022 T3 / Inside Information Software Survey](#),

as well as high praise from the latest Kitces Technology Report – [\*The Technology That Independent Financial Advisors Actually Use \(And Like\)\*](#). Advyzon was also recently named a finalist in three categories in the [Wealth Management Industry Awards](#), and CEO Hailin Li is a [ThinkAdvisor Class of 2022 Luminaries finalist for Executive Leadership](#) – winners to be announced in November.

## **THE 2022 AWARDS COMPETITION AND CEREMONY**

The fourteenth annual installment of the MMI/*Barron's* Industry Awards received a record number of nominations, indicating the extensive work being done in the advisory solutions space to deliver better outcomes for financial advisors and investors. The submissions are judged by [each of MMI's member firms](#), and a specially appointed MMI Industry Awards Steering Council and the MMI Membership Experience Committee review the nominations and select the finalists. Winners in each category will be revealed on October 20<sup>th</sup>, 2022, at the MMI Industry Celebration Dinner during the 2022 MMI Annual Conference taking place in Nashville, Tennessee.

To learn more about the awards ceremony, see category details, and more, [please click here](#).

## **ADVYZON INCLUDED IN SECOND CONSECUTIVE INC. 5000**

For the second consecutive year, Advyzon was included in the Inc. 5000 list, *Inc. Magazine's* annual rankings of America's fastest-growing private companies. In the 2022 rankings, Advyzon was ranked #3,397 thanks to their 154% 3-year revenue growth. Advyzon more than doubled the number of advisory firms they serve during that time period and continues to experience rapid growth in all facets of the company.

To see Advyzon's Inc. 5000 profile along with the full 2022 rankings, [please click here](#). To learn more about the Inc. 5000 list and the verification process, [please click here](#).

## **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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