

NEWS

For Immediate Release

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Advyzon and Shareholders Service Group Announce New Data-Sharing Integration

*Advisors who work with SSG now have access to
Advyzon’s all-in-one, cloud-based platform*

CHICAGO, IL (February 15, 2022) – [Advyzon](#), a comprehensive technology platform and all-in-one solution for financial advisors and investment managers, recently launched a partnership with [Shareholders Service Group](#) (SSG), which provides personalized custodial and brokerage services for independent Registered Investment Advisors (RIAs). The integration will allow advisors who utilize SSG’s platform in serving their clients to have access to Advyzon, providing them with the ability to see their clients’ holdings, balances, documents, and more within Advyzon’s cloud-based platform.

“We’re thrilled to be working more closely with SSG,” said John Mackowiak, Chief Business Development Officer at Advyzon. “This is a great opportunity for us to bring new tools to advisors already using Advyzon who have client accounts with SSG. It’s also a chance for us to offer the innovative, integrated solutions for which we’re famous to all advisors who do business with SSG.”

Advyzon’s all-in-one 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 developed the integration with SSG to ensure a seamless experience for their users. Advisors can view SSG client accounts within Advyzon and, with one click, take action on that account within the platform. “We know advisors have limited time,” Mackowiak said. “We are doing everything we can to save them a few steps and increase abilities that will allow them to work at their efficient best.”

In addition to having access to full account data files within Advyzon, the integration allows advisors who work with SSG to view account details and sync custodial documents such as tax forms and monthly statements.

“We are very excited to expand our relationship with Advyzon,” said Dan Skiles, President of SSG. “We have a great history of working together and this effort further supports our commitment to provide access to competitive technology products and solutions for the independent RIAs that work with SSG.”

The integration is now live and the Advyzon platform is available to all advisors that have a relationship with both SSG and Advyzon. A webinar recording demonstrating the integration is available on SSG Valet for advisors who work with SSG. Advisors can also learn more about the features available to them on the Advyzon platform at www.Advyzon.com/Features.

2022 T3 / INSIDE INFORMATION TECHNOLOGY SURVEY

The annual [survey produced by Bob Veres of Inside Information and Joel Bruckenstein of Technology Tools for Today \(T3\)](#) is now open for responses. This survey helps to provide the financial advisor community with a comprehensive guide to the profession’s diverse software ecosystem and complex technology landscape.

In addition to serving as a co-sponsor of the survey, Advyzon was included in four categories: Client Relationship Management (CRM), Financial Planning Software, Portfolio Management and/or Reporting Tools, and All-in-One Software. Advyzon has performed well in the survey in recent years, receiving the highest client satisfaction rating in the All-in-One Software category from 2018-2021.

SSG is also included in the survey again this year in the Custody Platforms category. SSG has performed very well in the survey over the years, including achieving the highest client satisfaction rating in their category, as well as one of the top ratings in the entire 2020 survey.

The full results and analysis of the 2022 survey will be made available during a presentation at the annual [T3 Advisor Conference](#), taking place May 2-4, 2022 in Denton, Texas, and through subsequent written commentary via *T3 Technology Hub* and *Inside Information*. Advisors interested in [providing a response to the survey can do so by clicking here](#).

ABOUT ADVYZON

Advyzon provides intuitive, all-in-one technology for RIAs by being a cloud-based platform that combines portfolio management, customizable performance reporting, trading and rebalancing, client web portals, client relationship management (CRM), client billing, and document storage. As a team of entrepreneurs with more than 150 years of combined experience in the financial services industry and 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, visit www.Advyzon.com.

ABOUT SHAREHOLDERS SERVICE GROUP

Shareholders Service Group (SSG) provides brokerage and custodial services exclusively for independent Registered Investment Advisors (RIAs). SSG provides a full range of brokerage and back-office service and support with a robust technology platform, access to a full suite of investment vehicles, and a highly experienced service team that only serves independent RIAs. The company was founded in 2002 and currently serves approximately 1,600 advisory firms throughout the country. To learn more, visit www.SSGInstitutional.com.

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