

## NEWS

For Immediate Release

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# Advyzon Announces Inaugural Conference for Financial Advisors and Industry Professionals

*First ever Advyzon Conference will take place  
February 20-22, 2024 in Phoenix*

**CHICAGO, IL (October 5, 2023)** – [Advyzon](#), a comprehensive service and technology platform and portfolio management solution for financial advisors and investment managers, today announced details on the inaugural [Advyzon Conference](#), which will take place February 20-22, 2024 at the Sheraton Phoenix Downtown Hotel.

Advyzon's conference mission is to bring outside-the-box thinking, technology, service, and experience together in a fun and joyful way. The three day conference will combine storytelling, immersive programming, and unrivaled technology to help take advisory firms to a whole new level.

The first ever Advyzon Conference will not be just a user forum, but an industry event featuring not only clients of Advyzon, but industry thought leaders, influencers, consultants, media, integration partners, and financial advisors and financial services firms of all kinds. The conference will also feature influential keynote speakers, educational breakout sessions, an exhibit hall with a variety of vendors and service providers, media opportunities, social events, networking, and more.

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 easy for advisors to run their financial planning and investment advisory firms while managing their client accounts with efficiency and ease. Advyzon currently serves nearly 1,400 advisory firms, many of whom have been clamoring for Advyzon to host a conference for years.

“We are extremely excited to finally be holding the inaugural [Advyzon Conference](#), which we believe will be one of the premier events in the industry,” said John Mackowiak, Chief Revenue Officer at Advyzon. “This is something that’s been in the works for the past few years, and we couldn’t be happier with the location and the itinerary we have planned so far. The feedback we’ve received has been phenomenal.”

## **KEYNOTE PRESENTATIONS AND BREAKOUT SESSIONS**

Keynote presentations at the 2024 Advyzon Conference will be delivered by a variety of experts, including industry thought leaders and influential speakers from outside of the financial services industry.

[Matthew Luhn](#), a director, storytelling consultant, and inspirational speaker with over 25 years of experience creating stories and characters at Pixar, will deliver a thoughtful presentation on telling your story and creating connection. Luhn will teach attendees how to use the secrets of great storytelling to captivate an audience, sell a product, idea, service, or strengthen a brand – bridging the gap between business and heart.

[Jeff Kilburg](#), a respected portfolio manager and founder of [KKM Financial](#), a boutique asset management company located in Chicago, will deliver a keynote presentation on how advisors can reclaim one day a week by outsourcing portfolio management. KKM Financial is one of the [latest strategists and asset managers to be added](#) to Advyzon Investment Management’s Nucleus Model Marketplace. AIM's managed portfolio solutions and high touch service model allow advisors to achieve operational efficiencies along with comprehensive investment selection and modeling, which, in turn, gives them more time to work on their business, not just in their business – a theme that Kilburg will delve into during his presentation.

[Nikolee Turner](#), director of business and technology consulting for [Charles Schwab & Co.](#), will also deliver a keynote presentation on the complexities of growing an advisory firm and creating enduring businesses through strategic planning.

While the agenda is still being finalized, additional sessions are being planned around AI, productivity hacks, relentless obsession, compliance, tax planning, and advisor marketing. There will also be Advyzon-specific sessions on how users can more efficiently and effectively utilize the highest-rated comprehensive technology solution in the industry (as documented by the [Kitces AdvisorTech Report](#) and the [T3 / Inside Information Software Survey](#)) – Advyzon.

To learn more about the conference speakers and see additional speakers as they’re added, [please click here](#). To see the full conference agenda, [please click here](#).

## **REGISTRATION INFORMATION AND SPONSORSHIP OPPORTUNITIES**

Registration is open now to Advyzon users and other financial advisors and industry professionals, with early bird pricing available to Advyzon users through November 15<sup>th</sup>, 2023. To learn more and register for the conference, [please click here](#).

Journalists interested in obtaining a special access press pass, please email [JonnySwift@ImpactCommunications.org](mailto:JonnySwift@ImpactCommunications.org).

Firms that are interested in sponsoring the conference can [click here for more information on sponsorship opportunities](#).

## **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](http://www.Advyzon.com). To learn more about Advyzon Investment Management, visit [www.AdvyzonIM.com](http://www.AdvyzonIM.com).

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