

## NEWS

For Immediate Release

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# Advyzon Embraces Tampa: 2025 Advyzon Annual Conference Registration is Live

*Industry-leading platform proudly unveils lineup and registration for second annual conference in February 2025 in Tampa, Florida*

**CHICAGO, IL (October 23, 2024)** – [Advyzon](#), a comprehensive technology platform and portfolio management solution for financial advisors and investment managers, today shared more details on the [2025 Advyzon Conference](#), which will take place February 12-14, 2025 at the Grand Hyatt Tampa Bay in Tampa, Florida.

Registration for Advyzon’s second annual conference is [now open](#) for financial advisors and other industry professionals.

“At Advyzon, we know Tampa has a significant recovery effort underway from Hurricane Milton,” said Dave Goes, Florida-based President of Enterprise Solutions at Advyzon. “Back in June, [Advyzon announced our 2025 Conference](#) to be held in Tampa Bay, and we’re now faced with a tough choice: Alter our plans and move to another state, or support the resilient city and figure out how to make it work. It’s in Advyzon’s DNA to look at a challenge and then help find a solution. As such, we’re announcing our commitment to the Tampa community. While it may not be easy, it’s the right thing to do.”

## **WHERE EXCEPTIONAL TECHNOLOGY CONVERGES WITH ENTREPRENEURIAL CREATIVITY AND PARTNERSHIP**

The [inaugural Advyzon Conference](#) was held in February 2024 in Phoenix, and for the second annual conference in 2025, Advyzon will feature even more prominent speakers and industry thought leaders, along with Advyzon-focused sessions in order to help advisors get the most out of the highest-rated comprehensive technology platform in the industry.

The keynote presentations will be headlined by the ultimate entrepreneur, [Daymond John](#), Founder/CEO of FUBU, Star of ABC's Shark Tank, and Presidential Ambassador for Global Entrepreneurship.

“We're so proud to support the Tampa community, people, and businesses,” said Hailin Li, Advyzon CEO and fellow entrepreneur. “Advyzon has always been centered around entrepreneurship, and who better to keynote our second annual conference than one of the most well-known entrepreneurs, **Daymond John**.”

Li and other members of the Advyzon Executive Leadership Team will participate in various sessions focused on the next generation of the Advyzon platform, as well as investment solutions for advisors.

Other sessions will be led by Florida-based **Joel Bruckenstein**, President of [T3 Technology Tools for Today](#) and producer of the annual [T3 Conference](#), the leading technology conference in the financial services industry; **Nyle Bayer**, CMO of [Future Proof](#), an award-winning events company dedicated to the modernization and advancement of the wealth management industry; **Cat Davies**, CEO of [Innovayte](#), a custody and clearing firm that supports entrepreneurial advisors; **Patrick Shaddow**, CEO of [Syntax Data](#), a financial data and technology company; some of the top marketing professionals in the industry, including **Marie Swift** of [Impact Communications, Inc.](#) and **Kelly Waltrich** of [Intention.ly](#); and many more influential industry speakers.

While the agenda is still being finalized, additional sessions are being planned around digital transformation, compliance, M&A, investment solutions, industry trends, and more.

## REGISTRATION INFORMATION AND SPONSORSHIP OPPORTUNITIES

Registration is open now to Advyzon users and other financial advisors and industry professionals. 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 and exhibiting at the conference can [click here for more information on sponsorship opportunities](#).

## ABOUT ADVYZON

Advyzon provides comprehensive wealth management technology, as well as investment solutions through Advyzon Investment Management, LLC (AIM), for RIAs and financial advisors. The Advyzon platform combines portfolio management, customizable performance reporting, trading and rebalancing, client web portals, mobile apps, CRM, client billing, and secure document storage, along with investment solutions and a model marketplace offered by AIM. Advyzon also provides networking and practice management experience via the annual Advyzon Conference. 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. Advyzon's exceptional technology and 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 (AIM), visit [www.AdvyzonIM.com](http://www.AdvyzonIM.com).

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