

NEWS

For Immediate Release

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Advyzon Named Best All-In-One Software Solution for 8th Consecutive Year in 2025 Advisor Software Survey from T3 and Inside Information

Comprehensive wealthtech platform receives stellar ratings and significantly increases market share in multiple categories of leading industry survey

CHICAGO, IL (March 6, 2025) – [Advyzon](#), a comprehensive technology platform and portfolio management solution for financial advisors and investment managers, recently achieved very high client satisfaction ratings and significantly increased market share in multiple categories of the [2025 T3 / Inside Information Advisor Software Survey](#) – including earning the highest rating in the All-In-One Software category (8.88) for the eighth consecutive year, and for the first time, becoming the market leader in the category by capturing a 9.96% market share.

The results of the annual technology survey and report, produced by [Joel Bruckenstein](#) of [T3 Technology Tools for Today](#) and [Bob Veres](#) of [Inside Information](#), were unveiled and presented live at the 2025 [T3 Technology Conference](#), taking place this week in Dallas. In a mainstage session titled “2025 and Beyond: Advyzon’s Vision for the Future”, the Advyzon executive leadership team provided insights on Advyzon’s rapid growth, product roadmap, and vision for the future.

“We’re incredibly proud to consistently earn top rankings in this industry-leading survey,” said **John Mackowiak**, Chief Revenue Officer at Advyzon. “Client satisfaction isn’t just a metric for us – it’s a reflection of the meaningful impact we’re making. The feedback we receive from our clients and partners confirms that we’re not just creating software; we’re delivering powerful solutions that truly transform the way financial advisors engage with their clients.”

The report dubbed client satisfaction ratings higher than 8.0 “remarkable” in its summary findings, and Advyzon achieved higher than 8.0 ratings in all 5 categories it was included in:

- Advyzon received the highest client satisfaction rating in the All-In-One Software category (8.88) – a feat they have now accomplished for the past eight consecutive years. They also increased market share from 3.12% to 9.96%, becoming the market leader in the All-In-One category. The report notes, “Advyzon’s rise in this category has been remarkable; over the past

couple of years, it has rounded out its offering with a sophisticated rebalancing solution and a sophisticated upgrade to its CRM with advanced workflow capabilities. Its user rating suggests that it will be contributing to this category's market share going forward."

- Advyzon received the highest client satisfaction rating in the CRM Programs category (8.49) for firms with more than 3% market share, increasing market share from 3.12% to 11.84%. The report notes, "Advyzon made a significant investment in its CRM capabilities, particularly in workflow automation – and the rating reflects user enthusiasm. Advyzon seems least likely to leak market share to its competition."
- Advyzon received the highest client satisfaction rating in the Portfolio Management/Reporting Tools category (8.73) for firms with more than 3% market share, increasing market share from 3.77% to 11%. The report notes, "Advyzon has evolved from a relatively small provider to third place in the rankings, more than doubling its market share over the past year. Advyzon seems especially poised to continue its challenge of the market share leaders."
- Advyzon received the highest client satisfaction rating in the Document Management category (8.48) for firms with more than 3% market share, increasing market share from 1.99% to 6.77%. The report notes, "Advyzon shot up in market share, more than tripling its percentage of users, and its 8.48 user rating outcompetes the broad consumer solutions. Advyzon is the only profession-specific solution that is going toe-to-toe with Microsoft, Citrix and Box.com."
- Advyzon received the second highest client satisfaction rating in the Trading/Rebalancing Tools category (8.18) for firms with more than 3% market share, increasing market share from 1.27% to 5.22%. The report notes, "Advyzon more than tripled their market share numbers from last year. Since Advyzon's rebalancing platform is still new to the marketplace, this represents rapid market share progress."

Thanks to their stellar ratings, Advyzon was dubbed a "Software All Star", solutions that finished in the top eight of their categories in market penetration and also achieved an extraordinary (8.0+) average user rating, in all five categories they were included in – the most "All Star" mentions of any firm in the entire survey.

In addition, in every category Advyzon was featured in, they were one of the most often named 'Programs Respondents Are Considering', including the most in All-In-One Software and Portfolio Management/Reporting Tools.

To see the full T3 / Inside Information Software Survey results, with insights and analysis from **Bob Veres** and **Joel Bruckenstein**, [please click here](#).

MARKET SHARE INCREASE AND HIGH RATINGS AMONG LARGER FIRMS

One of the main takeaways from the 2025 report is that Advyzon is gaining ground among larger advisory firms. The report notes, "Advyzon has evolved from a relatively small provider to third place in the [Portfolio Management/Reporting] rankings, more than doubling its market share over the past year." As was the case last year, the report also notes that "Advyzon seems especially poised to continue its challenge of the market share leaders."

Advyzon roughly tripled market share in all five categories it was included in and received high ratings from larger firms as well, with the report noting, "Advyzon generates user enthusiasm across the full spectrum of users."

Regarding its positioning as the new market leader in the All-In-One Software category, the report notes, “Advyzon’s rise in this category has been remarkable. Its user rating (8.88) suggests that it will be contributing to this category’s market share going forward.”

Advyzon is currently serving over 1,800 advisory firms with a rapidly growing user base. The great strides Advyzon has made in the last few years to enhance the platform and improve its comprehensive offerings to advisors has been driven by advisor feedback at every stage of development – with more big things to come in 2025 and beyond.

ALL-IN-ONE VS. BEST-OF-BREED / IN-HOUSE VS. INTEGRATIONS

The industry debate of comprehensive technology solutions vs. best-of-breed tech stacks continues to rage on, but the report shows that in addition to being the highest rated All-In-One solution, one could plausibly call Advyzon a best-of-breed solution in each of the various categories it fits into. Advyzon’s ratings across all five categories it qualified for were among the highest of the more than 900 programs featured in the report.

While most of the solutions providers in the All-In-One Software category have taken the “All-In-One-by-acquisition trend” by purchasing and merging best-of-breed software from multiple categories, Advyzon has been an exception to this trend, as all of the platform’s solutions were built in-house on single-source code.

“For best results, the experience needs to be cohesive – and the best way to do that is to build it yourself from the ground up rather than try to stitch things together,” said Mackowiak. “Building it ourselves has really given us – and our users – an advantage, and the seamless experience allows advisors to be more efficient and focus on what they do best.”

In addition, the report shows that for many of the providers in the All-In-One Software category, a high percentage of their users are using a different tool for various solutions. However, the report notes that “Advyzon has managed to keep its users from straying into the best-of-breed landscape.”

ABOUT ADVYZON

Advyzon provides comprehensive wealth management technology, as well as investment solutions through Advyzon Investment Management, LLC (AIM), for independent financial advisors, financial professionals, and financial institutions. The Advyzon platform combines portfolio management, customizable performance reporting, trading and rebalancing, web portals, mobile apps, CRM, 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 meaningful ways – developing innovations and integrations fueled by the practical needs of financial advisors. Advyzon’s exceptional technology and service are designed to transform the advisor experience through a single platform. To learn more about Advyzon, visit www.Advyzon.com. To learn more about Advyzon Investment Management (AIM), visit www.AdvyzonIM.com.

yHLsoft Inc., doing business as Advyzon (“Advyzon”) offers an integrated technology platform for financial advisors that includes customizable performance reporting, flexible billing, client relationship management (CRM), configurable client web portals, document storage, and business intelligence.

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