NEWS

For Immediate Release

Media Contact:
Jonny Swift
Impact Communications, Inc.
913-649-5009
JonnySwift@ImpactCommunications.org

Advyzon Announces 2027 Advyzon Conference: Showcasing the Next Wave of AI-Powered Wealth Management Innovation

'The Connections That Move Us Forward' brings financial advisors and industry leaders to Dallas for three days of product innovation, hands-on learning, and insights from Vanessa Van Edwards, Michael Kitces, Michael Townsend, and more

CHICAGO, IL (October 29, 2026) – Advyzon, a global AI-powered, unified wealth management technology and data platform, today announced details for the fourth annual 2027 Advyzon Conference, taking place February 24–26, 2027 at the Fairmont Dallas.

Registration is now open, with early bird rates available through October. Bringing together financial advisors, investment managers, technology innovators, and industry professionals, the three-day event will offer an inside look at Advyzon's latest product innovations, emerging AI capabilities, and the technology shaping the future of wealth management.

The 2027 conference theme is 'The Connections That Move Us Forward', reflecting the intersection of technology, ideas, and relationships that drive meaningful progress across the advisory industry.

"Technology is changing what's possible in wealth management," said **Hailin Li**, Founder and CEO of Advyzon. "But the ideas that challenge us, the people who inspire us, and the relationships we build are what turn possibility into progress. Because even as technology gets smarter, this remains a relationship business."

A FRONT ROW SEAT TO WHAT'S NEXT IN WEALTHTECH

At the 2027 Advyzon Conference, attendees will discover how Advyzon is reimagining the advisor experience through smarter, more connected technology designed around the way advisors actually work. Through live demonstrations, hands-on education, and direct access to the people designing and building the technology, attendees will see how Advyzon is translating AI from industry conversation into practical capabilities that change how advisors operate, manage

investments, and serve clients. Attendees will hear from voices shaping the wealth management industry, preview Advyzon's latest innovations, and build relationships that can move their business forward.

Since its 2024 debut, the Advyzon Conference has quickly evolved into one of the most anticipated gatherings in advisor technology – expanding each year in scale, energy, and influence. The 2026 conference tripled in size from the inaugural event in 2024 – click here to view highlights from the 2026 conference.

The 2027 event continues that momentum with expanded opportunities for hands-on learning, deeper product education, and meaningful interactions with peers, partners, and the Advyzon product and leadership team.

INDUSTRY LEADERS TAKE THE STAGE

This year's keynote will feature **Vanessa Van Edwards**, a renowned behavioral researcher, international bestselling author, and instructor at Harvard University. Van Edwards shares tangible skills to improve interpersonal communication and leadership. Her science-backed framework helps anyone communicate with confidence. Her presentations teach individuals how to succeed in business and life by understanding the hidden dynamics of people.

Prominent financial planner, educator, and entrepreneur known for advancing the financial advisory profession, **Michael Kitces** will also serve as a featured speaker.

Michael Townsend, Managing Director of Legislative and Regulatory Affairs, Charles Schwab & Co., Inc., will share insights on the regulatory landscape and what advisors should watch for heading into a new congress.

The 2027 Advyzon Conference will feature more than 75 speakers, including 25 breakout sessions and 15 mainstage presentations, led by some of the most influential voices in wealth management and advisor technology. Featured speakers include **Joel Bruckenstein**, President of T3 Technology Tools for Today and producer of the T3 Technology Conference; **Elyn Davis,** Senior Vice President of Client Experience for Raymond James RIA & Custody Services; **Amit Dogra**, Head of Retirement & Wealth, Alliant Retirement and Wealth; **Tony Leal**, Advyzon Strategic Advisor and former President of MoneyGuide; **Michael Papedis**, CEO and Co-Founder of Fusion Financial Partners; **Michael Rose**, Director of Wealth Management Research at Cerulli Associates, and more.

BUILT FOR ADVISORS, SHAPED BY ADVISORS

Beyond the mainstage, the conference offers attendees an opportunity to engage directly with Advyzon's leadership, product specialists, and engineers, gaining insight into the company's technology roadmap and the thinking behind its latest innovations.

"There's no shortage of AI promises in wealth management. But talking about what's possible and building technology that actually delivers are two very different things," said **Dirk Pearson**, Chief Operating Officer of Advyzon. "We've spent years investing in the unified architecture, engineering talent, and deep product expertise that make meaningful innovation possible. We

believe technology should adapt to the way advisors work, not the other way around. At this year's conference, advisors won't just hear about what's next. They'll experience it firsthand, meet the people building it, and help shape where we go next."

See the preliminary conference agenda here, currently featuring an 'at a glance' schedule that will continue to be fleshed out in the coming weeks and months.

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.

Firms that are interested in sponsoring and exhibiting at the conference can click here for more information on sponsorship opportunities.

ABOUT ADVYZON

Advyzon is a global wealth management technology platform redefining the future of advisory firms through unified intelligence. Founded by CEO Hailin Li, Ph.D., CFA®, Advyzon is built on an AI-native, open architecture that unifies portfolio management, performance reporting, trading and rebalancing, CRM, billing, document storage, and financial planning, as well as investment solutions through Advyzon Investment Management (AIM). Unlike fragmented ecosystems reliant on integrations and disconnected workflows, Advyzon delivers context-native, explainable, and workflow-aware AI experiences that enhance efficiency, strengthen oversight, and elevate client service. Nearly half of Advyzon's organization is dedicated to engineering and product development because we believe innovation isn't an initiative – it's our operating model. The platform serves RIAs, hybrid firms, family offices, and enterprise wealth organizations seeking a scalable foundation for growth. For more information, visit www.Advyzon.com.

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