

# NEWS

For Immediate Release

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## Advyzon Announces Dates and Location of 2025 Annual Conference

*In addition, comprehensive tech platform earns recognition from American Banker, WealthManagement.com, and Wealth Solutions Report*

**CHICAGO, IL (June 13, 2024)** – [Advyzon](#), a comprehensive service and technology platform and portfolio management solution for financial advisors and investment managers, today announces the dates and location of the second annual [Advyzon Conference](#), which will take place February 12-14, 2025 at the Grand Hyatt Tampa Bay in Tampa, Florida.

The [inaugural Advyzon Conference](#) took place earlier this year, held February 20-22, 2024 in Phoenix, Arizona, and combined storytelling, immersive programming, and unrivaled technology. The event was not just a user forum, but an influential industry event with not only clients of Advyzon in attendance, but industry thought leaders, influencers, consultants, media, integration partners, and financial advisors and financial services firms of all kinds.

The conference featured influential keynote speakers – including [Matthew Luhn](#), [Jeff Kilburg](#), and [Nikolee Turner](#) – educational breakout sessions, an exhibit hall with a variety of vendors and service providers, media opportunities, social events, networking, office hours for one-on-one training, and more. [Click here](#) to see videos and highlights from the conference on social media.

In addition, several key enhancements of the next generation platform – which includes a new mobile app, workflow automations, artificial intelligence capabilities, and rebalancing tax optimizations – were announced. Plus, [two new executive team members](#) were introduced: [Kartik Srinivasan](#) as President of Advyzon Institutional and [Dave Goes](#) as President of Enterprise Sales.

Advyzon also announced a new custody and retail investment infrastructure integration with [Apex Advisor Solutions](#) at the conference, where RIAs using Apex’s robust custody and clearing platform can harness the power of Advyzon’s award-winning, intuitive technology platform for advisors. The integration includes new account opening workflows, initial account funding, money movement, custodian fee file submission, and FIX trading.

## **WHERE EXCEPTIONAL TECHNOLOGY AND UNMATCHED SERVICE COME TOGETHER**

For the second annual conference, Advyzon plans to have even more prominent keynote speakers and industry thought leaders, hyper relevant breakout topics, leading service providers in the exhibit hall, and Advyzon-focused sessions in order to help advisors get the most out of the highest-rated comprehensive technology platform in the industry. They also plan to offer multiple tracks for advisors depending on their needs and interests.

“Our inaugural conference was a huge success and we got rave reviews,” said John Mackowiak, Chief Revenue Officer of Advyzon. “We set a high bar and now we intend to raise it, implementing attendee and sponsor feedback to make sure everyone leaves feeling they attended one of the best conferences in the industry.”

Registration for the 2024 Advyzon Conference will open soon, and advisors and sponsors interested in attending can [sign up for the Early Bird list](#) to receive registration alerts.

## **ADVYZON NAMED ONE OF THE BEST PLACES TO WORK IN FINTECH BY AMERICAN BANKER**

Advyzon was recently recognized and honored by multiple prominent industry publications. In the [Best Places to Work in Fintech 2024](#) list published by *American Banker*, Advyzon came in at #34 in the rankings of fintech firms thanks to the company’s pet-friendly office, beer fridge, 401(k) match, and many other perks and benefits.

The ranking was compiled in cooperation with the Best Companies Group and involves a two-step selection process. For the first part, applicants completed a thorough survey covering their policies and the benefits they provide to workers. For the second part, employees completed an engagement and satisfaction survey. To learn more about the selection process and to see the full list, [please click here](#).

## **ADVYZON NAMED A FINALIST IN THE 2024 WEALTH MANAGEMENT INDUSTRY AWARDS**

In addition, Advyzon was named a finalist in the [2024 WealthManagement.com Industry Awards](#) – an annual competition and industry-leading awards program often referred to as ‘The Wealthies’ – for the fourth consecutive year. In the 2024 awards, Advyzon was named a finalist in two categories under Technology Providers: ‘Rebalancing’ and ‘Portfolio Management, Accounting & Performance Reporting’ – highlighting Advyzon’s [Quantum Rebalancer](#) and the inaugural Advyzon Conference.

Additionally, Advyzon Investment Management (AIM), a turnkey asset management program (TAMP) under the Advyzon umbrella, was also named a finalist in two categories: ‘TAMPs’ and ‘Model Marketplaces’ – highlighting the launch of the AIM platform and the [Nucleus Model Marketplace](#).

For the tenth year this September, *WealthManagement.com* will honor the best companies, individuals, and organizations that support financial advisor success at its annual Industry Awards.

This year's winners, chosen by an independent panel of judges from among 287 finalists, will be announced on September 5<sup>th</sup> at a black-tie gala at the Ziegfeld Ballroom in New York City.

The finalists were culled down from more than 1,000 entries from more than 400 companies, and 104 firms were recognized for outstanding achievement in multiple categories, including Advyzon. With four combined categories, Advyzon tied for the third most finalist nods among all the companies that were honored.

To see the full list of finalists and to learn more about the 2024 *WealthManagement.com* Industry Awards, [please click here](#). To learn more about the 2024 Industry Awards gala and activities, [please click here](#).

## **KARTIK SRINIVASAN NAMED TOP AAPI INDUSTRY LEADER IN WEALTH SOLUTIONS REPORT**

Finally, Advyzon's [Kartik Srinivasan](#) was named 'President of the Year' in *Wealth Solutions Report's* Pathfinder Awards featuring the [Top AAPI Industry Leaders of 2024](#) in honor of Asian American and Pacific Islander Heritage Month in May. Srinivasan's recognition highlights his new role at Advyzon as President of Advyzon Institutional – a new business unit at the firm – as well as his illustrious career in the wealthtech space. He joined Advyzon in March of this year and was introduced to the Advyzon team and community at the inaugural Advyzon Conference.

"I'm very excited to receive this award from *Wealth Solutions Report* and be honored for AAPI Heritage Month," said Srinivasan. "But I'm even more excited to join Advyzon, bringing my two decades of experience serving independent advisors to help Advyzon expand into new markets and serve the increasingly unique and complex needs of advisors and their clients."

To learn more about Srinivasan and his new role at Advyzon, [please click here](#). To learn more about WSR's Pathfinder Awards and to see the full list of Top AAPI Industry Leaders of 2024, [please click here](#).

## **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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