

NEWS

For Immediate Release

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Advyzon Announces Partnership with iCapital[®] to Enhance Alts Capabilities and Reporting for Financial Advisors and Family Offices

Integration powers a streamlined experience for investing in alternatives directly within Advyzon’s comprehensive platform

CHICAGO, IL (December 10, 2024) – [Advyzon](#), a comprehensive technology platform and portfolio management solution for financial advisors and investment managers, today announced a robust new integration with [iCapital](#)¹, the global fintech platform driving the world’s alternative investment marketplace for the wealth and asset management industries.

The partnership will initially include data and fund activity integration from iCapital’s curated menu of alternative investment strategies into Advyzon’s portfolio reporting platform, as well as a seamless single sign-on (SSO) experience from Advyzon to iCapital. Future enhancements will incorporate iCapital’s user-friendly [Document Center](#) into Advyzon’s document vault, allowing Advyzon to surface alerts and tasks such as capital calls or subscription updates that appear in Advyzon’s CRM and dashboard.

“Our innovative partnership with Advyzon exemplifies our mission to create reliable, modular end-to-end reporting and data management services for all our clients,” said Steve Houston, iCapital Managing Director and Co-Head of iCapital Solutions. “We’ve created an easier solution that allows Advyzon’s network of advisors and family offices to gain access to this asset class and efficiently aggregate data. Through our partnership and suite of solutions, we’re empowering advisors to make more informed decisions about alternative investments on behalf of their clients, giving them a greater chance of achieving their financial objectives.”

The integration between Advyzon and iCapital will also be available in [Auria](#), the new offering from Advyzon Institutional for family offices and UHNW clients, [announced last month](#) and launching in Q1 2025. Evolving from the comprehensive Advyzon platform, Auria unites essential capabilities – including portfolio management, performance reporting, and CRM – into a single, seamless interface while also empowering advisors to manage intricate entities, track alternative investments, provide families with a holistic view of their total wealth, and more.

¹ iCapital, Inc., and its affiliates (together, “iCapital”)

“We’re very excited to partner with iCapital and introduce their alternative investment solutions into the Advyzon and Auria platforms,” said Kartik Srinivasan, President of Advyzon Institutional. “Advisors and family offices are allocating more of their client’s assets into alternatives, so this partnership with iCapital addresses a key need to aggregate and report on this growing asset class and provide clients with a holistic view of their wealth.”

To learn more about Advyzon, [please click here](#). To learn more about Auria, [please click here](#). To learn more about iCapital, [please click here](#).

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, 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 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.

AIM is a registered investment adviser registered with the United States Securities and Exchange Commission, and a wholly owned subsidiary of yHLsoft Inc., doing business as Advyzon ("Advyzon"). All investment advisory services are provided by AIM, while some technology and administrative support services are provided by Advyzon. AIM's advisory services are available to financial advisors for use in managing assets for their clients only, and do not provide advisory services directly to retail investors.

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