

## NEWS

For Immediate Release

**Advyzon Media Contact:**

Jonny Swift

Impact Communications, Inc.

913-649-5009

[JonnySwift@ImpactCommunications.org](mailto:JonnySwift@ImpactCommunications.org)



# Advyzon Announces Auria, New Product Offering for Family Offices and UHNW Clients

*Integrated solution from Advyzon Institutional redefines family wealth management*

**CHICAGO, IL (November 18, 2024)** – [Advyzon](#), a comprehensive technology platform and portfolio management solution for financial advisors and investment managers, today announced a new product offering from Advyzon Institutional called [Auria](#).

Evolving from Advyzon’s all-in-one platform, Auria is purpose built for the needs of UHNW clients and unites essential capabilities – 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.

“We’re so excited to finally unveil Auria – an initiative that we’ve been working on since I joined Advyzon earlier this year,” said **Kartik Srinivasan**, President of Advyzon Institutional. “In my numerous conversations with wealth managers and family offices, I consistently heard the need for technology that unifies key capabilities and can manage the complexities of UHNW clients – all in an easy-to-use and modern experience. With Auria, we are delivering just that for single-family offices, multi-family offices, and wealth managers and enterprises serving UHNW clients.”

Srinivasan shared additional comments in an Auria announcement video that also shares a first look at the Auria platform, [available to watch on the Auria website](#).

Launching in Q1 2025, Auria includes all the great capabilities available in the award-winning Advyzon platform – CRM, data aggregation, portfolio management, performance reporting,

trading and rebalancing, and secure document management. Additionally, the product includes new features tailored for the needs of complex clients, including enhanced net worth tracking, robust alternatives management and reporting, handling of multi-generational families and entities, and sophisticated visualization of clients and their assets via the Wealth Blueprint.

Advyzon CEO **Hailin Li** hinted that this newest product offering is just the beginning of what's to come from Advyzon in the near future: "Looking ahead to 2025, we are excited about the huge opportunities for better user experience, better service, better product, and better technology in the Family Office and UHNW space. The next phase of our evolution will not only raise the bar for the industry, but will make wealth management more intuitive, efficient, and impactful. One platform. One experience."

To learn more about Auria and stay informed on the official launch, [please click here](#). To learn more about Advyzon, [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<sup>®</sup>, 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](http://www.Advyzon.com). To learn more about Advyzon Investment Management (AIM), visit [www.AdvyzonIM.com](http://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.*

###