

# NEWS

For Immediate Release

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## Advyzon CEO Hailin Li Wins ThinkAdvisor 2024 Luminaries Award for Fintech Executive of the Year

*Prestigious industry award caps off a massive year of growth and development for leading comprehensive wealthtech platform*

**CHICAGO, IL (December 17, 2024)** – **Hailin Li**, founder and CEO of [Advyzon](#), a comprehensive technology platform and portfolio management solution for financial advisors and investment managers, last week was named the winner of the Executive of the Year award among Technology Platforms, Products and Services in the [ThinkAdvisor 2024 Luminaries Awards](#).

The Luminaries Awards celebrate the trailblazers redefining excellence in financial services. Now in its fourth year, this prestigious program recognizes the visionary firms and individuals driving innovation and making a transformative impact on both the industry and the profession. The 2024 winners were announced at the Luminaries Awards Ceremony held at the Fontainebleau Las Vegas on December 11<sup>th</sup>, 2024.

“It's such an honor to be recognized as the Executive of the Year and join the *ThinkAdvisor* Luminaries Class of 2024,” said Li. “This has been a pivotal year for Advyzon, marked by the launch of our community-driven conference, the recognition of AIM’s Nucleus Model Marketplace, and the natural extension of our platform to serve Enterprise and Institutional firms. We've also forged new partnerships and integrations, all while staying focused on our mission to transform the advisor experience through a single platform with a single data model and single source code.”

In addition to winning the Executive of the Year Award, Advyzon was also named a Luminaries Finalist for the Unified (All-in-One) Systems Firm Award in Innovation, highlighting Advyzon’s comprehensive platform for wealth management professionals. This marks the third consecutive year that Advyzon has been named a Luminaries Finalist, after Li made the final cut for Executive Leadership in 2022 and the firm was named a finalist in 2023 for Financial & Investment Innovation.

To see the full list of Luminaries winners and finalists, [please click here](#).

## A REMARKABLE YEAR OF GROWTH AND DEVELOPMENT

The *ThinkAdvisor* Luminaries Award caps off a remarkable year of growth, development, and accomplishments for Advyzon, with more big things to come in 2025. Luminaries recipient **Hailin Li** adds: “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.”

The Luminaries recognition comes on the heels of Advyzon Investment Management (AIM) [winning the Model Marketplaces award](#) in the [2024 WealthManagement.com Industry Awards](#) – an annual competition and industry-leading awards program often referred to as ‘The Wealthies’ – highlighting the launch of the [Nucleus Model Marketplace](#), plus ongoing enhancements to the platform and the addition of leading asset managers and strategists.

In November, [Advyzon announced Auria](#), a new product offering from Advyzon Institutional for family offices and UHNW clients. Launching in Q1 2025, Auria includes new features tailored for the needs of complex clients such as 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.

In October, [Advyzon opened registration for the second annual Advyzon Conference](#), which will take place February 12-14, 2025 at the Grand Hyatt Tampa Bay in Tampa, Florida. The community-focused conference features prominent speakers and industry thought leaders, along with Advyzon-focused sessions, immersive programming, and much more.

In 2024 alone, Advyzon introduced seven major partnerships and integrations:

- In December, Advyzon [integrated with iCapital](#) to create a streamlined experience for investing in alternatives directly within Advyzon, which will also be available in Auria
- In October, AIM [partnered with Syntax Data](#) to provide direct indexing solutions for advisors directly within the Advyzon platform
- In August, Advyzon [partnered with Fidelity](#) for their All-in-One Bundle, combining clearing and custody services via Fidelity and financial planning capabilities via eMoney with Advyzon’s suite of operational and portfolio management software
- Also in August, Advyzon [partnered with Innovayte](#) to launch a state-of-the-art comprehensive platform and model marketplace, creating a custodial back-end platform for Innovayte with investment solutions provided by AIM
- In July, AIM [integrated with FINIAT](#) to automate and personalize portfolio management for clients plus streamline investment strategies
- In February, Advyzon announced a custody and retail investment infrastructure [integration with Apex Advisor Solutions](#), with the strategic partnership expanded in December thanks to an [integration with AIM](#) to streamline investment management processes
- Also in February, AIM [partnered with Nebo Wealth](#) to create an end-to-end solution enabling RIAs to streamline and automate the process of delivering personalized portfolios for clients at scale
- Plus [added a multitude of new asset managers](#) and strategists to the Nucleus Model Marketplace, including BlackRock, Fidelity, JP Morgan, Dimensional Fund Advisors, Potomac Fund Management, Zacks, Invesco Advisers, Inc., and more – now featuring more than 270 strategies from over 50 asset managers

In addition, Advyzon added a handful of esteemed industry professionals to their executive team:

- In August, [Samantha Schwimmer was announced](#) as the firm's first Chief Marketing Officer, with over 15 years of experience in the financial services industry and previous stints at Charles Schwab, Northern Trust, Ariel Investments, and more
- In June, [Scott Smith was introduced](#) as Chief Revenue Officer of AIM, with 20+ years of industry experience at Goldman Sachs, BNY Mellon Pershing, Fidelity, Schwab, and more
- In March, Advyzon announced that [Kartik Srinivasan was joining](#) as President of Advyzon Institutional, a newly created business unit at the firm, after two decades spent building innovative solutions for advisors at Schwab and Morningstar
- Also in March, [Dave Goes was introduced](#) as President of Enterprise Solutions to build out Advyzon's enterprise sales organization after nearly two decades at Morningstar

Finally in 2024, Advyzon earned the [highest rating in the All-In-One Software category](#) of the 2024 T3 / Inside Information Advisor Software Survey for the seventh year in a row, made the [Inc. 5000 list](#) of America's fastest-growing private companies for the fourth consecutive year, and was included in American Banker's 2024 list of [Best Places to Work in Fintech](#).

## **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).

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