

## NEWS

For Immediate Release

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# Advyzon Introduces Samantha Schwimmer as Chief Marketing Officer

*New CMO joins all-in-one tech platform after stints at Northern Trust, Schwab, Hightower, and more*

**CHICAGO, IL (August 14, 2024)** – [Advyzon](#), a comprehensive service and technology platform and portfolio management solution for financial advisors and investment managers, recently announced that [Samantha Schwimmer](#) has joined the team as Chief Marketing Officer. With nearly 15 years of experience in the financial services industry, Schwimmer brings her marketing expertise to the award-winning all-in-one wealthtech platform.

“As someone who has always enjoyed the passion and entrepreneurial spirit of the RIA industry, I was thrilled to get this opportunity with Advyzon – it was too exciting to pass up,” said Schwimmer. “I’ve always enjoyed working with advisors and entrepreneurs and helping to build their brands. I love to solve problems and deliver solutions that are intuitive and innovative, and I’m excited to bring that passion to Advyzon as a shareholder and help continue to grow and enhance the tremendous brand that’s been built already.”

Schwimmer has been tasked with helping Advyzon enhance its market presence, better demonstrate its value, and move into new market segments – namely on the enterprise, institutional, and investment management sides of the business – in addition to providing continued support to Advyzon’s exceptional core technology solutions. She will oversee all marketing related activities, bringing her extensive marketing experience and insights to the growing company, which has been named to the [Inc. 5000 list](#) of America's fastest-growing private companies for the past three years. As a professional woman that has found many opportunities and much success in the financial services industry, Schwimmer is passionate about cultivating next-gen and female talent at Advyzon and throughout the industry.

Prior to joining Advyzon as CMO, Schwimmer served as Vice President at Northern Trust Asset Management, where she oversaw the creation of global integrated marketing campaigns and programs and also ran the content and creative team. In addition, she previously served as

Marketing Director at Ariel Investments, RIA Channel Director at Charles Schwab, and Marketing Director at Hightower Advisors. Schwimmer earned a Bachelor of Arts in Communication Media Studies with a minor in Marketing from San Diego State University.

“Samantha’s experience speaks for itself,” said Hailin Li, CEO of Advyzon. “We’re very excited to have her join our growing team and help us continue to grow and expand into new markets – ultimately bringing our comprehensive solution to more advisors and improving the advisor experience across the industry.”

## **REJOINING FORCES UNDER THE ADVYZON BANNER**

This hire adds to an impressive year of growth and new hires for Advyzon, highlighted by three Schwab veterans rejoining forces under the Advyzon banner.

In addition to Schwimmer, who spent nearly 6 years at Schwab, [Scott Smith was introduced](#) in June as Chief Revenue Officer of [Advyzon Investment Management \(AIM\)](#), the TAMP under the Advyzon umbrella. With 20+ years of industry experience, including 4 years at Schwab Advisor Services, Smith is an accomplished executive with additional previous stints at Goldman Sachs, BNY Mellon | Pershing, Envestnet, Fidelity, and TD Ameritrade Institutional.

Another notable former Schwab executive, Kartik Srinivasan was announced as President of Advyzon Institutional, a newly created business unit at the firm, in March. Srinivasan has a long track record of building innovative solutions for advisors, most notably at Schwab and Morningstar. Former Morningstar colleague Dave Goes was also [introduced at the inaugural Advyzon Conference](#), joining the firm as President of Enterprise Sales. Goes served in various enterprise selling and business leadership roles at Morningstar for nearly 20 years.

All four executives added to the team this year, including Schwimmer, are well-respected mainstays in the industry and have extensive experience in serving independent advisors and improving the advisor experience. Reuniting these former colleagues as part of the Advyzon Executive Leadership Team positions the firm to continue the impressive momentum.

Advyzon's cloud-based platform combines portfolio management, customizable performance reporting, trading and rebalancing, client web portals, CRM, client billing, and document storage – plus a model marketplace with access to third party strategists via turnkey asset management with AIM – making it easy for advisors to run their financial planning and investment advisory firms while managing their client accounts with efficiency and ease. Advyzon currently serves over 1,600 advisory firms.

To learn more about Schwimmer and Advyzon, [please click here](#).

## **ABOUT ADVYZON**

Advyzon provides comprehensive, cloud-based wealth management technology, as well as investment management services through Advyzon Investment Management, LLC (AIM), for registered investment advisors (RIAs) and independent financial advisors. The Advyzon platform combines portfolio management, customizable performance reporting, trading and rebalancing, client web portals, mobile apps, client relationship management (CRM), client billing, and

document storage, along with investment management services 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 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 (AIM), visit [www.AdvyzonIM.com](http://www.AdvyzonIM.com).

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