

NEWS

For Immediate Release

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Advyzon Investment Management (AIM) Adds New Asset Managers, Including BlackRock and DFA

TAMP now has over 280 strategies from 46 asset managers

CHICAGO, IL (May 21, 2024) – [Advyzon Investment Management](#) (AIM), a turnkey asset management program (TAMP) under the umbrella of comprehensive technology platform [Advyzon](#), recently added multiple new asset managers and strategists to their platform, including [BlackRock](#), [Dimensional Fund Advisors](#), [Potomac Fund Management](#), and [Invesco Advisers, Inc.](#)

“Our continued focus is on providing advisors easy access to the tools and services they need,” said Meghan Holmes, Chief Operating Officer at AIM. “These recent additions are based on advisor-driven requests. By providing access to some of the most well-known asset managers, while also supporting smaller boutique providers, advisors have choice and flexibility in customizing a client’s overall portfolio in order to meet their needs.”

In addition to BlackRock, Dimensional, Potomac, and Invesco, AIM has also added Washington Crossing Advisors, Brentview Investment Management, Morgan Dempsey Capital Management, and Clark Capital Management to the platform since the beginning of 2024. With these new strategists, AIM currently has over 280 strategies available to financial advisors in their [Nucleus Model Marketplace](#), from 46 asset managers – including Advyzon Investment Management.

AIM EMPOWERS ADVISORS TO WORK ON THEIR BUSINESS, NOT IN IT

Advyzon Investment Management, which launched in March of 2022, was created to allow financial advisors to be more efficient via a better integrated user experience by providing TAMP services conveniently within Advyzon's single source code platform. AIM’s managed portfolio solutions and high touch service model allow advisors to achieve operational efficiencies along with comprehensive investment selection and modeling, while empowering them to work on their business, not in it.

Advyzon's cloud-based platform combines portfolio management, customizable performance reporting, trading and rebalancing, client web portals, client relationship management (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 1,500 advisory firms.

AIM offers risk-based models including active/passive mutual funds and ETFs, a tax-sensitive ETF only solution, an ESG active/passive model, an alternative model, and direct indexing, as well as tools and methodologies around tax optimization and tax loss harvesting. The firm has continued to build out additional investment products around all of these core offerings, as well as offer new strategies, as they've evolved over the course of their first year in business.

In addition to their investment offering, AIM provides a personalized service model to advisors based on their philosophy of insourcing versus outsourcing. AIM's service team members are personally assigned to individual advisors and take the time to truly understand their businesses, helping with the heavy lifting on the whole lifecycle of an account including account opening, billing, reporting, trading, data reconciliation, and acting as a custodial liaison.

Within the past year, AIM has announced multiple partnerships with industry leaders. In May 2023, [tru Independence announced](#) that Advyzon was chosen to provide the foundational chassis for truView, a new Experience-As-a-Service (EAS) platform that combines behavioral finance, fintech, and human capital to drive business growth.

In February 2024, AIM [announced a partnership with Nebo Wealth](#) – an award-winning asset allocation and portfolio design platform from global asset manager Grantham, Mayo, Van Otterloo & Co., LLC (GMO) – where AIM powers and serves as a turnkey platform for Nebo Wealth, creating an end-to-end solution that enables RIAs to streamline and automate the process of delivering personalized portfolios for each and every client at scale.

NUCLEUS MODEL MARKETPLACE

In Spring 2023, AIM announced the launch of the [Nucleus Model Marketplace](#), which is fully integrated into the comprehensive, award-winning Advyzon platform built on single source code. Adding a model marketplace enhances AIM's TAMP offering and moves Advyzon closer than ever to offering a fully comprehensive solution for financial advisors and investment managers to run their firms.

The Nucleus model marketplace is structured for unified managed accounts (UMAs) and includes sleeve-level reporting and trading. Users have access to nearly 300 risk-based models and SMAs from some of the top third-party management firms in the industry – traded by AIM – incorporating both advisor created models and strategist sleeves.

Single and multi-sleeve setup and trading include a variety of features, including cash management, dollar-cost averaging (DCA) and required minimum distribution (RMD) schedules, a 'Do Not Buy/Sell' securities list, equivalencies, carve outs, location optimization, maximum annual cap gain limit, onboarding tax management and ongoing tax loss harvesting, and wash sale alerts. AIM plans to add to Nucleus' features and capabilities in the coming months.

To learn more about Advyzon Investment Management and the Nucleus Model Marketplace, [please click here](#).

ABOUT ADVYZON AND ADVYZON INVESTMENT MANAGEMENT

Advyzon provides comprehensive, intuitive, cloud-based, wealth management technology for independent financial advisors and registered investment advisors (RIAs). The Advyzon technology platform combines Advyzon Investment Management's turnkey asset management program (TAMP) with portfolio management, customizable performance reporting, trading and rebalancing, client web portals, client relationship management (CRM), client billing, and document storage. AIM's managed portfolio solutions and high touch service model empowers financial advisors to achieve operational efficiencies along with comprehensive investment selection and modeling. 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. To learn more about Advyzon, visit www.Advyzon.com. To learn more about Advyzon Investment Management, visit www.AdvyzonIM.com.

ABOUT STRATEGISTS

With the exception of the propriety models offered by AIM, all other Strategists in the Nucleus program are independent companies that are unaffiliated with AIM and act as service providers to AIM.

There is no form of legal partnership, agency affiliation, or similar relationship between financial advisors using the program and the Strategists or AIM, nor is such a relationship created or implied by the information herein. Strategists are not involved with the preparation of the content supplied by AIM.

Statements made by third parties in this communication that indicate approval, support, or recommendation of Advyzon Investment Management (AIM) are considered endorsements. These endorsements are made by representatives of third party strategists, which are not current clients of AIM, and no cash compensation was paid to these parties for their statements. AIM receives compensation from third party strategists on the platform to cover the cost of AIM's administration and monitoring of the Models/Strategies. In addition, third party strategists on the AIM platform will receive compensation when advisors employ their strategies.

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