

# NEWS

For Immediate Release

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## **Advyzon Investment Management (AIM) Names Scott Smith, Former Executive at Goldman Sachs and BNY Mellon | Pershing, Chief Revenue Officer**

*TAMP adds accomplished industry veteran to continue growth and momentum*

**CHICAGO, IL (June 4, 2024)** – [Advyzon Investment Management](#) (AIM), a turnkey asset management program (TAMP) under the umbrella of comprehensive technology platform [Advyzon](#), announced today the hiring of [Scott Smith](#) as Chief Revenue Officer (CRO).

An accomplished executive in the financial services industry – having previously worked at Goldman Sachs, BNY Mellon | Pershing, Envestnet, Fidelity, Schwab Advisor Services, and TD Ameritrade Institutional – Smith brings his 20+ years of industry experience to the rapidly growing TAMP and will oversee sales, marketing, pricing, and revenue management, focusing on continued growth and success.

“I’m thrilled to join AIM’s executive leadership team and to help expand Advyzon’s investment management business,” said Smith. “With over 20 years of experience, I’ve seen many innovations, but Advyzon’s entrepreneurial ingenuity – represented by its “best-in-class” all-in-one platform – truly stands out. I’m privileged to lead the sales efforts for AIM as we continue to drive the company’s rapid expansion, represented by AIM’s Nucleus Model Marketplace and UMA capabilities, and we’re excited to bring our cutting-edge solutions to the wider market.”

### **A HISTORY OF EXCELLENCE IN THE FINANCIAL SERVICES INDUSTRY**

Scott Smith joins AIM after previously serving as Head of Central Division RIA Custody Sales at Goldman Sachs for the past three years. Prior to his role at Goldman Sachs, he served as Vice President of Business Development at BNY Mellon | Pershing for three and a half years, as well as Vice President and Regional Director at Envestnet for three years.

Earlier in his career, Smith served as Vice President of Sales at Fidelity Institutional Wealth Services for four years and as a Relationship Manager at Schwab Advisor Services for four years. He got his start in the financial services industry as a Relationship Manager and Vice President of

Sales at TD Ameritrade Institutional, where he spent two years. He earned a degree in Mass Communication and Media Studies from York College of Pennsylvania in 1999.

At every stop during his career, Smith was a top producer and earned much recognition for his ability to secure partnerships, generate opportunities, surpass financial objectives, and improve sales results with repeatable and sustainable strategies.

“Scott is a known commodity within the wealth management industry and given his background, I couldn’t think of anyone better to join our team to help evangelize Advyzon’s capabilities in the Investment Management space,” said Lee Andreatta, CEO of AIM. “Whether it’s our third-party model marketplace, Nucleus (built to support third-party SMAs/UMAs), our rebalancer, Quantum (which helps advisors and registered representatives function as portfolio managers), our prowess and flexibility around trading – including tax optimization and tax-loss harvesting – Scott is uniquely suited to help us showcase our value to the marketplace.”

To learn more about Smith, [please click here](#).

## **A FULLY COMPREHENSIVE SOLUTION FOR FINANCIAL ADVISORS**

Advyzon Investment Management, which launched in Spring 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.

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.

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.

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.

In May 2024, AIM [added multiple new asset managers](#) and strategists to the Nucleus Model Marketplace, including BlackRock, Dimensional Fund Advisors, Potomac Fund Management, and Invesco Advisers, Inc.

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](http://www.Advyzon.com). To learn more about Advyzon Investment Management, visit [www.AdvyzonIM.com](http://www.AdvyzonIM.com).

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