

# NEWS

For Immediate Release

**Media Contact:**

Jonny Swift

Impact Communications, Inc.

913-649-5009

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



## **Advyzon Investment Management (AIM) Partners with FINIAT to Provide Turnkey Trading and Portfolio Management**

*New integration elevates portfolio management for financial services professionals*

**CHICAGO, IL (July 9, 2024)** – [Advyzon Investment Management](#) (AIM), a turnkey asset management program (TAMP) under the umbrella of comprehensive technology platform [Advyzon](#), recently announced a partnership with [FINIAT](#), a leading provider of wealth management software that enables financial advisors to provide turnkey trading for their client’s portfolios.

The partnership takes FINIAT’s powerful solutions to the next level by integrating them with Advyzon’s trading and portfolio management capabilities. This seamless integration enables financial advisors to:

- Automate and personalize portfolio management for each client, leveraging FINIAT’s Intelligent Allocation® Portfolio Management Platform and iindex® Intelligent Indexing solutions
- Access a comprehensive, end-to-end portfolio management solution that streamlines investment strategies and enhances client outcomes
- Scale their business with confidence, backed by Advyzon’s robust and scalable architecture

“We’re very excited to have the opportunity to partner with FINIAT and help enhance their turnkey platform,” said Lee Andreatta, CEO of AIM. “Our technology was designed to make advisors’ lives easier, and we’re happy to bring the capabilities of Advyzon to FINIAT and Advyzon advisors alike.”

“The trend of passive investing strategies has left many advisors searching for ways to demonstrate their value to their clients,” said Rob Bandy, CEO of FINIAT. “Advisors increasingly are

struggling to differentiate from low cost index providers. They are searching for more customized strategies that can treat market volatility as an opportunity.”

With Advyzon’s innovative technology, FINIAT’s solutions will be automated, allowing advisors to effortlessly maintain optimal portfolios – with dynamic adjustments to reflect changing market conditions and client goals. Advisors can prioritize high-value activities such as client relationships and business development while the platform handles the intricacies of portfolio management.

## **CONTINUOUSLY OPTIMIZING PORTFOLIO STRATEGIES WITH AN ACTIVE APPROACH**

FINIAT is a technology company dedicated to empowering advisors with a proprietary quantitative engine that continuously optimizes portfolio strategies, providing explainable adjustments using an active approach. In a world of indexing and lower fees, FINIAT offers a robust suite of technologies, including the Intelligent Allocation® Portfolio Management Platform, which provides active adjustments in an explainable way to advisors, and iindex® Intelligent Indexing Solutions, providing an intuitive way to quickly create stock SMAs that keep only the stocks needed in order to align closely to initial risks.

FINIAT differentiates advisors and their portfolio management through proprietary technologies that position and adjust client portfolios according to the profile determined by the advisor. As the market changes, the portfolio changes – providing value to the client with explainable adjustments.

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

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 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.

## **ABOUT ADVYZON AND ADVYZON INVESTMENT MANAGEMENT**

Advyzon provides comprehensive, intuitive, cloud-based, wealth management technology for independent financial advisors and registered investment advisors (RIAs) and currently serves over 1,500 advisory firms. 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).

## **ABOUT FINIAT**

After enduring the 2008-2009 financial crisis in buy-and-hold portfolios, Rob Bandy, founder of FINIAT, was desperate for a different way to manage investments and wanted to regain some control against a volatile and merciless market. With buy-and-hold portfolios, the primary option is to sell part of the portfolio, but knowing when to buy back in is nearly impossible. FINIAT was created to try to take back some of that control. The firm aimed to give financial advisors a clear process to follow and a message that is easy to articulate to clients, demonstrating the value advisors provide. Rob found early success using a data-driven approach to adjusting portfolios with clients, providing them with a more stable portfolio and better risk-adjusted returns. FINIAT offers advisors access to institutional-level portfolio management, delivering algorithmic portfolio adjustments to help mitigate downside volatility and capitalize on the upside by increasing exposure to productive assets. This approach provides advisors with a distinctive portfolio strategy and story, enhancing the client's overall portfolio experience by focusing on their journey and needs while still using familiar investments – but leveraging a proprietary methodology. FINIAT focuses on enabling advisors to stay ahead of the curve in portfolio management, allowing them to feel confident and prepared. To learn more about FINIAT, visit [www.FINIAT.com](http://www.FINIAT.com).

*There is no form of legal partnership, agency affiliation, or similar relationship between FINIAT and either Advyzon or AIM, nor is such a relationship created or implied by the information herein.*

*Statements made by FINIAT in this communication that indicate approval, support, or recommendation of Advyzon Investment Management (AIM) are considered endorsements. These endorsements are made by representatives of FINIAT, and FINIAT has a business relationship with AIM. No cash compensation was paid to these parties for their statements; however, AIM receives compensation from FINIAT to cover the cost of AIM's services for Advisors that establish a relationship with FINIAT.*

*All investments and investment strategies involve the risk of loss. Investors are encouraged to consult with a financial professional before investing.*

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