

# NEWS

For Immediate Release

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## Advyzon Investment Management (AIM) Wins WealthManagement.com Industry Award for Model Marketplaces

*Advyzon also named a finalist in the ThinkAdvisor 2024  
Luminaries Awards*

**CHICAGO, IL (September 12, 2024)** – [Advyzon Investment Management](#) (AIM), a turnkey asset management program (TAMP) under the umbrella of comprehensive technology platform [Advyzon](#), was named the winner of the ‘Model Marketplaces’ award in the TAMPs category of the [2024 WealthManagement.com Industry Awards](#) – an annual competition and industry-leading awards program often referred to as ‘The Wealthies’. The firm was recognized at the tenth annual Industry Awards ceremony and gala, held on September 5<sup>th</sup>, 2024, at the Ziegfeld Ballroom in New York City.



“We’re absolutely thrilled to be recognized by *WealthManagement.com* and accept this prestigious award,” said Lee Andreatta, CEO of AIM. “Our team has been hard at work on our Nucleus Model Marketplace since we [launched it in Spring 2023](#), and we’ve been determined to make it one of the most robust model marketplaces available to advisors. Combined with AIM’s managed portfolio solutions and Advyzon’s all-in-one wealhtech platform, we’re convinced that our offering is the most comprehensive solution available to advisors today.”

John Mackowiak, Chief Revenue Officer of Advyzon, and Mike Ursitti, Senior Vice President of Business Development at AIM, attended the awards ceremony and accepted the award, with Mackowiak participating in a red carpet video interview with the industry-leading publication. The evening red carpet, cocktail reception, and black-tie awards ceremony was attended by more than 500 industry executives and team members from leading asset management firms, RIAs, B/Ds, custodians, technology providers, and other industry-related companies.



In addition to winning the ‘Model Marketplaces’ award, AIM was also named a finalist in the ‘TAMPs’ category – highlighting the launch of the AIM platform and Nucleus. Further, Advyzon was named a Wealthies finalist for the fourth consecutive year – this year, in two categories under Technology Providers: ‘Rebalancing’ and ‘Portfolio Management, Accounting & Performance Reporting’ – highlighting Advyzon’s [Quantum Rebalancer](#) and the inaugural Advyzon Conference.

This year, 92 awards were presented to 84 companies from a pool of 287 finalists. Winners were chosen by an independent panel of industry judges and honored the best companies, individuals, and organizations that support financial advisor success. The finalists were culled down from more than 1,000 entries from more than 400 companies, and 104 firms were recognized for outstanding achievement in multiple categories – including Advyzon. With four combined categories between Advyzon and AIM, Advyzon tied for the third most finalist nods among all the companies that were honored.

To see the full list of winners and finalists, and to learn more about the 2024 *WealthManagement.com* Industry Awards, [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, allowing Advisors to further curate custom models consisting of advisor defined, AIM, and third-party investment manager models in a Unified Managed Account (UMA) structure. This 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 1,600 advisory firms.

Within the past 18 months, AIM has announced multiple partnerships with other 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. Nucleus now features 48 asset managers and over 300 model portfolios. The following month, Scott Smith, an accomplished executive in the financial services industry with stints at Goldman Sachs, BNY Mellon | Pershing, Envestnet, Fidelity, Schwab Advisor Services, and TD Ameritrade Institutional, was [introduced as Chief Revenue Officer of AIM](#).

In July 2024, AIM [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 – which takes FINIAT's powerful solutions to the next level by integrating them with Advyzon's trading and portfolio management capabilities.

In August 2024, [Fidelity picked Advyzon](#) 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, including performance reporting, billing, CRM, and document storage, as well as investment management tools via AIM.

Later in August, Advyzon [launched a partnership with Innovayte](#), a custody and clearing firm that supports entrepreneurial RIAs and wealth managers, with Advyzon powering a state-of-the-art custodial back-end platform and model marketplace provided by AIM.

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

## **ADVYZON NAMED A FINALIST IN THINKADVISOR 2024 LUMINARIES AWARDS**

In addition, Advyzon was recently named a finalist in two categories of the [ThinkAdvisor 2024 Luminaries Awards](#) among Technology Platforms, Products and Services. The Luminaries Awards recognize the visionary firms and individuals driving innovation and making a transformative impact on both the industry and the profession.

Advyzon’s first finalist nod was for the Unified (All-in-One) Systems Firm Award in Innovation, highlighting Advyzon’s comprehensive platform for wealth management professionals, including new features and developments introduced in the last 18 months.

The second was for the Executive of the Year Individual Award, where Advyzon CEO Hailin Li was named a finalist for the second time. 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.



**FINALIST**

“We’re very excited to be recognized in both of these industry-leading awards programs,” added Mackowiak. “This recognition reinforces all of our hard work and the enhancements we continually make to our platform in order to best serve our advisors and their clients.”

The 2024 Luminaries program will culminate at the 4<sup>th</sup> Annual *ThinkAdvisor* Luminaries Awards dinner and gala on Wednesday, December 11<sup>th</sup> in Las Vegas.

To see the full list of finalists and to learn more about the *ThinkAdvisor* 2024 Luminaries, [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) and currently serves over 1,500 advisory firms. A team of entrepreneurs led by CEO Hailin Li, Ph.D., CFA®, Advyzon strives to innovate in strategic and useful ways. The Advyzon technology platform combines portfolio management, customizable performance reporting, trading and rebalancing, client web portals, client relationship management (CRM), client billing, and document storage, along with investment management services and a model marketplace offered by Advyzon Investment Management, LLC (AIM). AIM's managed portfolio solutions and high touch service model empowers financial advisors to achieve operational efficiencies along with comprehensive investment selection and modeling. 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).

*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.*

*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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