

# NEWS

For Immediate Release

**Media Contact:**

Jonny Swift

Impact Communications, Inc.

913-649-5009

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



## **Advyzon Investment Management Introduces First Manager-Traded Strategies with Schwab Asset Management**

*Partnership expands fixed income options for financial advisors  
with actively managed, institutional-quality bond strategies*

**CHICAGO, IL (January 26, 2026)** – [Advyzon Investment Management \(AIM\)](#), a seamlessly integrated unified investment solutions platform through the comprehensive wealthtech platform [Advyzon](#), announced an exciting new relationship with [Schwab Asset Management®](#), offering [Wasmer Schroeder® Strategies](#), a provider of a broad host of portfolio strategies across the duration, credit, and tax-efficiency spectrum. Schwab Asset Management and its Wasmer Schroeder Strategies will be the first fixed income focused strategist available in AIM’s Manager Traded Strategy program.

As the first manager traded strategies available on AIM’s [Nucleus Model Marketplace](#), Schwab Asset Management will manage the day-to-day trading. The AIM investment team currently builds and trades individual bond strategies, but the Wasmer Schroeder Strategies will be AIM’s first actively managed strategies by an outside fixed income manager.

“We’re very excited to announce this new relationship with Schwab Asset Management and bring their expertise to AIM’s leading model marketplace,” said **Lee Andreatta**, CEO of AIM. “This milestone represents a significant evolution in our platform capabilities. As our first manager-traded strategies and first outside fixed income provider, the Wasmer Schroeder Strategies expand the breadth and depth of investment solutions available to advisors on our platform. We’ve built a strong foundation with our own laddered bond strategies, and now we’re opening the door to management from leading specialists. This partnership underscores our commitment to providing advisors with the flexibility, choice, and innovative tools they need to be able to deliver exceptional outcomes for their clients.”

In addition, [Schwab Model Portfolios](#), including Core Enhanced ETF and Passive-Active strategies, are available within Nucleus. Schwab Model Portfolios are designed to be straightforward, transparent, and easy to understand. Leveraging Schwab Asset Management’s ABC asset allocation framework, they use a behavior-based approach to encourage positive investor behavior and help clients stay invested through all types of markets.

“By expanding access of the Wasmer Schroeder Strategies and Schwab Model Portfolios, we’re opening the door for more advisors to utilize institutional quality bond strategies along with models designed to be transparent and easy to understand,” said **Amos Robinson**, Managing Director of Wealth and Asset Management Solutions at Charles Schwab. “We’re proud to partner with Advyzon Investment Management to make adoption seamless and scalable.”

To learn more about Nucleus, [please click here](#) or contact [Sales@AdvyzonIM.com](mailto:Sales@AdvyzonIM.com). To learn more about Wasmer Schroeder Strategies, [please click here](#).

## **ABOUT SCHWAB ASSET MANAGEMENT**

One of the industry’s largest and most experienced asset managers, Schwab Asset Management offers a focused lineup of competitively priced ETFs, mutual funds and separately managed account strategies designed to serve the central needs of most investors. By operating through clients’ eyes, and putting them at the center of our decisions, we aim to deliver exceptional experiences to investors and the financial professionals who serve them. As of December 31, 2025, Schwab Asset Management managed approximately \$1.6 trillion on a discretionary basis and approximately \$38.0 billion on a non-discretionary basis. More information is available at [www.SchwabAssetManagement.com](http://www.SchwabAssetManagement.com).

## **ABOUT ADVYZON AND ADVYZON INVESTMENT MANAGEMENT (AIM)**

Advyzon is a unified wealth management platform built on modern, proprietary architecture for financial advisors, wealth management firms, broker-dealers, and family offices. Founded by CEO Hailin Li, Ph.D., CFA<sup>®</sup>, Advyzon integrates portfolio management, performance reporting, trading, CRM, billing, and document storage within a single source platform, as well as investment solutions through Advyzon Investment Management (AIM). With 50% of its team dedicated to engineering and product development, Advyzon focuses on continuous innovation based on user feedback and industry needs. Advyzon serves various segments of the financial services industry through specialized solutions, including Advyzon Core for RIAs, Advyzon Enterprise for larger institutions, and Auria for family offices and ultra-high-net-worth clients. For more information, visit [www.Advyzon.com](http://www.Advyzon.com) and [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 references to investment advisory services are provided by AIM, while technology and administrative support services are provided by Advyzon. AIM’s advisory services are available to financial advisers for use in managing assets for their clients. AIM does not provide advisory services directly to retail investors. Professionals employed by Advyzon may refer qualified Advisory Firms to AIM. If a referred Advisory Firm engages AIM’s services, the referring professional will receive a referral fee.*

*Statements made in this communication that indicate approval, support, or recommendation of AIM are considered endorsements. These endorsements are made by representatives of Schwab Asset Management who are not current clients of AIM. No cash compensation was paid to these parties for their statements; however, these parties receive economic benefit as a result of their participation in the Nucleus platform.*

*Portfolio Management for Wasmer Schroeder Strategies is provided by Charles Schwab Investment Management, Inc., doing business as Schwab Asset Management®, a registered investment adviser). Schwab Asset Management is a subsidiary of The Charles Schwab Corporation.*

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