NEWS

For Immediate Release

Media Contact:
Jonny Swift
Impact Communications, Inc.
913-649-5009
JonnySwift@ImpactCommunications.org

Advyzon Launches the Industry's Only Natively Built, AI-Powered Cash Flow Planning Experience Within a Unified Wealth Management Platform

New Advyzon Financial Planning offering brings deep cash flow modeling, unified client data, and contextual AI directly into advisors' daily workflows, connecting financial planning with investment decisions and ongoing client service

CHICAGO, IL (October 27, 2026) – Advyzon, a global AI-powered, unified wealth management technology and data platform for advisory firms, today announced the launch of Advyzon Financial Planning, a comprehensive cash-flow planning and projection solution built natively into the Advyzon platform.

Led by **Kevin Hughes**, President of Financial Planning at Advyzon, whose nearly two decades of experience have helped shape financial planning technology, the solution combines deep planning expertise with Advyzon's unified architecture and agentic AI capabilities.

THE PLANNING RUNS DEEP, THE WORKFLOW STAYS SIMPLE

Designed for deep planning without unnecessary operational complexity, Advyzon Financial Planning combines robust calculation engines with the client, household, account, portfolio, net worth, and budget data already in Advyzon. Advisors can model financial decisions – including Social Security timing, Roth conversions, portfolio optimization, and changing planning strategies – without rebuilding the client in a separate system or maintaining another version of the data.

The distinction extends beyond the planning process itself. By connecting financial planning with proposals, portfolio construction, investment management, and ongoing monitoring, Advyzon

helps advisors translate financial advice into investment decisions and continued client service – all within one platform.

Advyzon AI further streamlines the work. Embedded throughout the advisor experience, not confined to a chat window, AI brings relevant context forward, surfaces insights in the moment, and prepares next steps for advisor review. Underpinning the experience is more than a decade of advisor workflow intelligence, combined with Advyzon's unified data foundation and deep product and engineering expertise. The result is an AI-enabled planning experience grounded in the advisor's existing client data and workflow, moving planning from a separate exercise into a natural part of how the firm operates.

For **Kevin Hughes**, that vision starts with listening to advisors: "Listening to our customers over the past year has reinforced our conviction: financial planning belongs at the center of the advisor experience – not just from a relationship perspective but also a technology perspective. We're bringing that vision to life with planning, AI, and the entire Advyzon platform working as one. I couldn't be prouder of what the financial planning team has delivered, and we're only getting started."

ONE PLANNING EXPERIENCE, MULTIPLE LEVELS OF DEPTH

Advyzon Financial Planning offers two complementary forecasting experiences designed for different levels of client complexity, both built on the same underlying calculation engine.

- **Comprehensive cash-flow planning:** For clients whose financial needs extend beyond a single goal. Model multiple goals and cash-flow needs together across the client's complete financial picture, including income, expenses, and changing financial circumstances.
- **Goals-Based Investing:** For focused financial questions and individual client goals, using broad assumptions and existing investment and net worth data to quickly assess probability of success and connect the conversation to an investment strategy or proposal.
- **AI where the work happens:** Embedded throughout the Advyzon experience, AI brings relevant client and portfolio context forward, accelerates scenario modeling, surfaces opportunities, and prepares next steps for advisor review.
- **Connected implementation:** Financial planning decisions can inform proposals, portfolio construction, investment management, and ongoing monitoring without requiring advisors to rebuild recommendations across disconnected applications.
- **Ongoing client context:** Planning remains connected to the household record, client portal, portfolio information, and ongoing advisor activities, making it easier to revisit assumptions and evaluate changing client circumstances.
- **More depth to come:** Advyzon Financial Planning will continue to expand with more advanced planning strategies across retirement distributions, short-term tax analysis, estate planning, and more. Advyzon AI will help advisors compare options, surface tradeoffs, and identify potential combinations and sequences of strategies for consideration.

ONE PLATFORM, ONE CLIENT, ONE SUPPORT EXPERIENCE

Because planning operates on the same unified data set as CRM, portfolio management, reporting, and client service, advisory firms can reduce the complexity of maintaining separate versions of the client across disconnected systems. And because the experience is part of Advyzon, users have one support team with visibility across the broader platform – not just the planning tool.

The result is financial planning that isn't another destination in the advisor's technology stack. It's an integral part of the platform they already use to serve clients.

Advyzon Financial Planning is available now. To learn more, please click here and contact Planning@Advyzon.com.

ABOUT ADVYZON

Advyzon is a global wealth management technology platform redefining the future of advisory firms through unified intelligence. Founded by CEO Hailin Li, Ph.D., CFA®, Advyzon is built on an AI-native, open architecture that unifies portfolio management, performance reporting, trading and rebalancing, CRM, billing, document storage, and financial planning, as well as investment solutions through Advyzon Investment Management (AIM). Unlike fragmented ecosystems reliant on integrations and disconnected workflows, Advyzon delivers context-native, explainable, and workflow-aware AI experiences that enhance efficiency, strengthen oversight, and elevate client service. Nearly half of Advyzon's organization is dedicated to engineering and product development because we believe innovation isn't an initiative – it's our operating model. The platform serves RIAs, hybrid firms, family offices, and enterprise wealth organizations seeking a scalable foundation for growth. For more information, visit www.Advyzon.com.

###