

## NEWS

For Immediate Release

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# Advyzon Named Best All-In-One Software Solution for 9<sup>th</sup> Consecutive Year in 2026 Advisor Software Survey from T3 and Inside Information

*Advyzon Investment Management (AIM) premieres as “Software All-Star” in Portfolio Design and TAMP categories*

CHICAGO, IL (March 26, 2026) – [Advyzon](#), a comprehensive technology platform and portfolio management solution for financial advisors and investment managers, earned industry-leading client satisfaction ratings across multiple categories of the [2026 T3 / Inside Information Software Survey](#) – one of the most respected studies in the wealthtech industry.

## CONSISTENT LEADERSHIP ACROSS CORE ADVISOR TECHNOLOGY

Advyzon was recognized as a ‘Software All-Star’ – achieving top satisfaction ratings and meaningful market share across five categories: All-In-One Programs, CRM, Portfolio Management Tools, Trading/Rebalancing, and Account Aggregation. The survey also identified Advyzon as one of the platforms advisors are most likely to switch to across every category in which it appeared.

Another important milestone this year – [Advyzon Investment Management \(AIM\)](#), the firm’s unified investment management platform – earned ‘Software All-Star’ recognition in two categories in its first year in the survey: Portfolio Design Solutions and TAMP Service Providers.

“Earning ‘Software All-Star’ recognition in both categories in our first year validates what AIM has built,” said **Lee Andreatta**, CEO of AIM. “Advisors want an investment platform that is truly unified with their technology ecosystem, and AIM delivers exactly that – natively built portfolio design and investment solutions within the broader Advyzon platform. These results reflect the hard work of our team and the confidence our clients have placed in us.”

“Being recognized as the top-rated All-In-One Solution for the ninth consecutive year is incredibly meaningful,” said **John Mackowiak**, Chief Revenue Officer of Advyzon. “Advyzon wasn’t built

by stitching together integrations. We built one global, cohesive system from the ground up – CRM, portfolio management, trading, billing, reporting, and business insights all operating from a single database with the built-in support for multi-currencies and multi-languages. Advisors feel that difference and see much more value every day, and these results confirm our approach is resonating.”

The results were unveiled live in New Orleans at the 2026 [T3 Technology Conference](#) by the authors of the report, [Joel Bruckenstein](#) of [T3 Technology Tools for Today](#) and [Bob Veres of Inside Information](#).

## REDEFINING WHAT ‘ALL-IN-ONE’ REALLY MEANS

The survey authors highlighted Advyzon’s differentiated strategy, noting that while many firms claim to be all-in-one, “Advyzon was built entirely internally, with the integrations as part of the construction process.”

Ratings above 8.0 are classified as “extraordinary”. Across Advyzon and AIM, that threshold was exceeded in eight combined categories.

Key highlights:

- **All-In-One Software:** Highest user rating (8.63) for the ninth consecutive year, with the second highest total market share (9.50%), earning ‘Software All Star’ distinction.
- **CRM:** Highest satisfaction rating (8.35) among firms with more than 2% market share, and third-highest market share (10.19%).
- **Portfolio Management / Reporting:** Second-highest satisfaction rating (8.44) among providers with more than 2% of market share, with strong momentum as one of the “most likely for advisors to switch to.”
- **Trading / Rebalancing:** Second-highest client satisfaction rating (8.11) among firms with more than 3% of market share, alongside steady market share growth.
- **Account Aggregation Tools:** Standout debut with the highest satisfaction rating (8.24) among firms with more than 3% market share.
- **Document Management:** Second-highest satisfaction rating (8.56), recognized for delivering document management natively within a broader advisor platform.

## AIM EARNS “SOFTWARE ALL-STAR” RECOGNITION IN DEBUT SURVEY APPEARANCE

In its first year included in the survey, AIM posted top tier results in both evaluated categories:

- **Portfolio Design Solutions:** Highest satisfaction rating (8.20) among firms with more than 1% market share.
- **TAMP Service Providers:** Highest satisfaction rating (8.29) among firms with more than 0.25% market share.

To view the full T3 / Inside Information Software Survey results, with additional insights and analysis from **Bob Veres** and **Joel Bruckenstein**, [please click here](#).

## A SNEAK PEAK AT ADVYZON'S NEW FINANCIAL PLANNING CAPABILITIES

During a main stage presentation at the T3 Conference, **Kevin Hughes**, President of Financial Planning, unveiled Advyzon's upcoming goals-based financial planning capabilities, launching in 2026.

"We believe in creating an all-in-one ecosystem that truly is a 'greatest hits' experience," said Hughes. "It's part of our DNA. Advisors should be able to work in a completely unified environment rather than stitching together the best-of-breed model the industry has chased for the last 20 years."

To learn more about Advyzon's Financial Planning capabilities, [please click here](#).

## ADVYZON RECOGNIZED IN PROMINENT INDUSTRY AWARDS PROGRAMS

In addition to its survey performance, Advyzon and AIM have recently been recognized across multiple industry award programs, including:

- **2026 WealthTech Americas Awards by WealthBriefing:** Winner of the Client / Consolidated Reporting Award in the [2026 WealthTech Americas Awards](#).
- **2026 Family Wealth Report Awards by WealthBriefing:** Finalist in consolidated Reporting, CRM System, and Portfolio Management in the [2026 Family Wealth Report Awards](#) – driven by the launch of [Auria](#), Advyzon Institutional's platform tailored for UHNW clients and family offices.
- **2026 BISA Technology Innovation Award:** Winner of the [BISA Technology Innovation Award](#) for [Advyzon Enterprise Solutions](#).
- **2025 ThinkAdvisor Luminaries Awards:** **Lee Andreatta** named CEO of the Year in Investment Management in the [2025 ThinkAdvisor Luminaries Awards](#).
- **2025 InvestmentNews Hot List:** **Brian Huckstep**, Chief Investment Officer of AIM, and **Kartik Srinivasan**, President of Advyzon Institutional named to [2025 InvestmentNews Hot List of Top Wealth Professionals](#).

For more information on Advyzon's industry awards and recognitions, [please click here](#).

## ABOUT ADVYZON AND ADVYZON INVESTMENT MANAGEMENT

Advyzon is a global, cohesive wealth management platform built on modern, open architecture for financial advisors, wealth management firms, broker-dealers, banks, trusts and family offices. Founded by CEO Hailin Li, Ph.D., CFA®, Advyzon unites portfolio management, performance reporting, trading, CRM, billing, and document storage (plus, in 2026, financial planning) 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.Adyzon.com](http://www.Adyzon.com) and [www.AdyzonIM.com](http://www.AdyzonIM.com).

*Advyzon Investment Management (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.*

*March 2026: Advyzon and Advyzon Investment Management (“AIM”) recognition in the T3/Inside Information Software Survey is based on an independent industry survey of financial advisors regarding technology usage and satisfaction. The results reflect the views of participating advisors and may not represent the experience of all users. The survey evaluates advisor technology and user satisfaction and does not evaluate or guarantee investment performance or client outcomes. Advyzon did not provide compensation in exchange for the survey results. Advyzon sponsored the survey to help offset production costs. Sponsorship did not include participation in survey responses, scoring, or the publication of results. For more information about this survey, please visit: <https://t3technologyhub.com/>. Investment advisory services are offered by AIM, a registered investment adviser, and is a wholly owned subsidiary of yHLsoft Inc., doing business as Advyzon (“Advyzon”).*

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