

# NEWS

For Immediate Release

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## **Advyzon Named Best All-In-One Software Solution in 2023 Advisor Software Survey from T3 Technology Tools for Today and Inside Information**

*In addition, comprehensive technology platform announces new  
model marketplace at T3 Technology Conference*

**CHICAGO, IL (March 30, 2023)** – [Advyzon](#), a comprehensive service and technology platform and portfolio management solution for financial advisors and investment managers, recently achieved high client satisfaction ratings and showed significant increase in market share across multiple categories in the [2023 T3 / Inside Information Software Survey](#) – including earning the highest rating in the All-In-One Software category for the sixth year in a row.

The results of the annual technology survey and report, produced by [Joel Bruckenstein of T3 Technology Tools for Today](#) and [Bob Veres of Inside Information](#), were unveiled and presented live at the recent [T3 Advisor Conference](#), which took place March 13<sup>th</sup> – 16<sup>th</sup> in Tampa, Florida and saw nearly 1,000 total attendees.

“We’re very excited to yet again score top marks in this industry-leading survey and report,” said John Mackowiak, Chief Revenue Officer at Advyzon. “It’s an honor to see that our clients are highly satisfied with our platform and our offerings, and extremely encouraging to see our continued growth in market share in the industry.”

### **ALL-IN-ONE VS. BEST-OF-BREED**

While the industry debate of comprehensive technology solutions vs. best-of-breed tech stacks rages on, the report did note that in addition to being the highest rated All-In-One solution: “Based on the ratings in the various categories its software fits into, one could plausibly call [Advyzon] a best-of-breed solution in each of them.”

Advyzon’s average rating across all of the categories it qualified for was among the highest of the more than 800 firms featured in the report: “[Advyzon’s] user ratings are among the highest in the

entire survey, and they have consistently earned high user satisfaction scores since we began polling the profession.”

In addition, the report noted that while most of the solutions providers in the All-In-One Software category have taken the “All-In-One-by-acquisition trend” by purchasing and merging best-of-breed software from multiple categories, Advyzon has been an exception to this trend, as all of the platform’s solutions were built in-house on single-source code.

“For best results, the experience needs to be cohesive – and the best way to do that is to build it yourself from the ground up rather than try to stitch things together,” said Mackowiak. “Building it ourselves has really given us – and our users – an advantage, and the seamless experience allows advisors to be more efficient and focus on what they do best.”

**The report dubbed client satisfaction ratings higher than 8 “remarkable” in its summary findings:**

- Advyzon received the highest client satisfaction rating (8.77) in the All-In-One Software category – a feat they have now accomplished for the past six years (every year since 2018)
- Advyzon scored the highest client satisfaction rating (8.52) in the Portfolio Management/Reporting Tools category for firms with more than 0.8% market share
- Advyzon received the second-best overall client satisfaction rating (8.46) in the CRM category, and the highest overall for firms with more than 3% market share
- Advyzon scored an 8.04 rating in the Document Management category, their first year in this category
- Advyzon received a 7.89 rating in the Trading/Rebalancing Tools category, their first year in this category after launching [Advyzon Quantum®](#) in Spring 2022, a robust rebalancer seamlessly integrated into the Advyzon platform

**Advyzon also showed growth in market share within all of these categories:**

- Grew from 3.56% to 4.26% in the All-In-One Software category (up from fourth to third overall)
- Grew from 3.80% to 4.93% in the Portfolio Management/Reporting Tools category (sixth overall)
- Grew from 4.25% to 4.50% in the CRM category (up from sixth to fifth overall)
- Earned 2.57% market share in their first year in the Document Management category
- Earned 2.21% market share in their first year in the Trading/Rebalancing Tools category
- Also named often in ‘Programs Respondents Are Considering’ within these categories, and was listed among ‘Other Programs Mentioned’ in multiple other categories

Thanks to their stellar ratings, Advyzon was dubbed a “Software All Star” – solutions that finished in the top five of their categories in market penetration and also achieved an extraordinary (8.0+) average user rating – receiving a user rating of 8.77 while ranking third in market share in the All-In-One Software category, and a user rating of 8.46 while ranking fifth in market share in the CRM category. Only three other firms besides Advyzon qualified for the “Software All Star” list more than once.

In addition, Advyzon was named to the list of “Mighty Mites” in Portfolio Management/Reporting Tools and Document Management – solutions that were not market share leaders but achieved an extraordinary (8.0+) average user rating. Only six other firms besides Advyzon were named to the “Mighty Mites” list more than once.

To see the full T3 / Inside Information Software Survey results, which Advyzon was also proud to be a sponsor of, [please click here](#).

## **DRIVEN BY ADVISOR FEEDBACK**

While Advyzon routinely receives high ratings in the T3 / Inside Information Software Survey, thanks to the increase in market share and many mentions in ‘Programs Respondents Are Considering’, the 2023 report acknowledged that “it looks like the marketplace has begun to notice Advyzon’s year-in-year-out high user ratings.” Advyzon is currently serving nearly 1,300 advisory firms with a rapidly growing user base.

The great strides Advyzon made in the last few years to improve its offerings to advisors was driven by advisor feedback at every stage of development. Over the years, the Advyzon team began to see that advisors wanted additional, comprehensive options for asset management solutions without having to look outside of Advyzon's comprehensive platform. Therefore, Advyzon launched [Advyzon Investment Management \(AIM\)](#) in Spring 2022, a comprehensive turnkey asset management program (TAMP) fully integrated into Advyzon’s cloud-based platform – a natural evolution for Advyzon.

## **ADVYZON INVESTMENT MANAGEMENT ANNOUNCES NUCLEUS MODEL MARKETPLACE AT T3 CONFERENCE**

During their main stage session at the T3 Conference, Advyzon announced that they are launching their new model marketplace called Nucleus, which will be fully integrated into the award-winning Advyzon platform, with the option to be Advyzon traded with advisor built UMAs or pre-set UMA portfolios built by AIM, or advisor traded with Nucleus access available in Advyzon’s Quantum Rebalancer.

“Adding a model marketplace enhances AIM’s TAMP offering and moves Advyzon closer than ever to offering a fully comprehensive solution that allows financial advisors and investment managers to run their firms while managing client accounts with efficiency and ease,” said Lee Andreatta, CEO and co-founder of [Advyzon Investment Management](#).

To learn more about the Nucleus model marketplace, [please click here](#).

## **ABOUT ADVYZON**

Advyzon provides comprehensive, intuitive, cloud-based wealth management technology and investment management services for independent financial advisors and registered investment advisors (RIAs). The Advyzon tech 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. A team of entrepreneurs

led by CEO Hailin Li, Ph.D., CFA®, Advyzon strives to innovate in strategic and useful ways. Financial advisors inspire Advyzon's innovation and integrations. Their exceptional technology and unmatched service exist to improve the advisor experience – whether it's via portfolio and firm management or client relationships and growth. 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).

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