

NEWS

For Immediate Release

Media Contact:

Jonny Swift

Impact Communications, Inc.

913-649-5009

JonnySwift@ImpactCommunications.org



Advyzon Named Finalist in 2023 Wealth Management Industry Awards and ThinkAdvisor Luminaries Awards

Industry leading awards programs acknowledge comprehensive technology platform for consecutive years

CHICAGO, IL (June 30, 2023) – [Advyzon](#), a comprehensive service and technology platform and portfolio management solution for financial advisors and investment managers, has been named a finalist in the [2023 WealthManagement.com Industry Awards](#), an annual competition and industry-leading awards program often referred to as the Wealthies, for the third consecutive year. In the 2023 awards, Advyzon was named a finalist in two categories under Technology Providers: 'Unified (All-In-One) Systems' and 'Rebalancing'.

For the ninth year this September, WealthManagement.com will honor the best companies, individuals, and organizations that support financial advisor success at its annual Industry Awards. This year's winners across 92 categories, chosen by an independent panel of judges from more than 400 finalists, will be announced on September 7th at a black tie gala at the Ziegfeld Ballroom in New York City. The finalists were culled down from more than 1,000 entries from 413 companies, and 81 firms were recognized in multiple categories, including Advyzon.

To see the full list of finalists and to learn more about the 2023 WealthManagement.com Industry Awards, [please click here](#). To learn more about the 2023 Industry Awards gala and activities, [please click here](#).

ADVYZON A FINALIST IN THE 2023 THINKADVISOR LUMINARIES AWARDS

In addition, Advyzon was named a finalist in the [2023 ThinkAdvisor Luminaries Awards](#) in the Financial & Investment Innovation category among Fintech/TAMP Platforms. The Luminaries Awards shine a spotlight on individuals and firms that are taking the most creative and boldest steps to push the investment advisory industry forward, while having the biggest impact. This

marks the second consecutive year Advyzon has been named a finalist in the Luminaries Awards, as CEO Hailin Li was named a finalist in the Executive Leadership category in 2022.

“We’re very excited to be named a finalist again in both of these industry-leading awards programs,” said John Mackowiak, Chief Revenue Officer at Advyzon. “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 2023 Luminaries program will culminate at the 3rd Annual ThinkAdvisor Luminaries Awards Dinner held in New York City on November 28th.

To see the full list of finalists and to learn more about the 2023 ThinkAdvisor Luminaries, as well as the Awards Dinner, [please click here](#).

A FULLY COMPREHENSIVE SOLUTION FOR FINANCIAL ADVISORS

Advyzon was named a finalist in the rebalancing category of the Wealthies thanks to [Advyzon Quantum®](#), their robust rebalancer seamlessly integrated into the Advyzon platform, which was officially launched in April 2022. In the past 18 months, in addition to launching Quantum, Advyzon also launched [Advyzon Investment Management](#) (AIM), a comprehensive turnkey asset management program (TAMP), as well as a new model marketplace called [Nucleus](#), both of which are fully integrated into Advyzon's award-winning, cloud-based platform.

All three of these important initiatives moved Advyzon closer than ever to offering a fully comprehensive solution for financial advisors and investment managers and were the main factors in being named a finalist in the Luminaries Awards.

The accolades come on the heels of Advyzon achieving top marks and high client satisfaction ratings 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.

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. To learn more about Advyzon Investment Management, visit www.AdvyzonIM.com.

###