

# NEWS

For Immediate Release

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## Advyzon Named Finalist in Three Categories in 2022 Wealth Management Industry Awards

*Judges acknowledge comprehensive technology platform for the second consecutive year*

**CHICAGO, IL (June 14, 2022)** – [Advyzon](#), a comprehensive technology platform and portfolio management solution for financial advisors and investment managers, has for the second consecutive year been named a finalist in the [WealthManagement.com Industry Awards](#), an annual competition and industry-leading awards program often referred to as the Wealthies.

**In the 2022 awards, Advyzon was named a finalist in three categories:**

1. Portfolio Management, Accounting, and Performance Reporting
2. Rebalancing
3. Unified (All-In-One) Systems

“We’re so excited to be named a finalist again in the Wealthies Awards,” said John Mackowiak, Chief Business Development 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.”

Advyzon was named a finalist in the rebalancing category thanks to [Advyzon Quantum®](#), their robust rebalancer officially launched in April 2022. Advyzon’s cloud-based platform combines portfolio management, customizable performance reporting, trading and rebalancing, client web portals, client relationship management (CRM), client billing, and document storage, making it easy for advisors to run their financial planning and investment advisory firms while managing their client accounts with efficiency and ease. Advyzon is currently serving over 1,100 advisory firms.

The accolades come on the heels of Advyzon recently achieving top marks and high client satisfaction ratings across multiple categories in the [2022 T3 / Inside Information Software Survey](#),

as well as high praise from the 2021 Kitces Technology Report – [\*The Technology That Independent Financial Advisors Actually Use \(And Like\)\*](#).

To learn more about the 2022 WealthManagement.com Industry Awards, [please click here](#).

## **THE 2022 AWARDS COMPETITION AND CEREMONY**

The WealthManagement.com Industry Awards are judged by a [panel of independent judges](#) made up of top names in the industry, overseen by editor-in-chief David Armstrong. The eighth annual installment received a record-shattering number of nominations, with nearly 1,000 entries from more than 350 companies. In all, 225 organizations were selected as finalists, with Advyzon being one of ninety-two firms recognized for outstanding achievement in multiple categories.

The final round of judging has now begun, with the winners in each category to be revealed on September 8, 2022, at the grand gala and awards ceremony taking place at the Ziegfeld Ballroom in New York City.

“The record-setting participation in our industry awards this year is a testament to the value firms continue to place in the Wealthies as their best opportunity of the year to enhance their reputation, increase their brand awareness and set their organization apart from the competition,” said William O’Conor, Managing Director of WealthManagement.com. “This year we’re pleased to announce that we’ll be celebrating and honoring our awards finalists and winners with in-person events in New York City, along with simultaneous virtual broadcasts accessible to a broader audience of awards team members and other wealth management professionals across the nation.”

To learn more about the awards ceremony, see category details, and more, [please click here](#).

## **ABOUT ADVYZON**

Advyzon provides comprehensive, intuitive, cloud-based, wealth management technology 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. A team of entrepreneurs led by CEO Hailin Li, Ph.D., CFA®, Advyzon strives to innovate in strategic and useful ways. Financial advisors inspire their innovation and integrations, and 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).

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