

# NEWS

For Immediate Release

**Media Contact:**

Jonny Swift

Impact Communications, Inc.

913-649-5009

[JonnySwift@ImpactCommunications.org](mailto:JonnySwift@ImpactCommunications.org)



## Advyzon and RightCapital Announce Updates to Data-Sharing Integration

*Fintech leaders also provide details on new Probability of Success widget*

**CHICAGO, IL (October 18, 2023)** – [Advyzon](#), a comprehensive service and technology platform and portfolio management solution for financial advisors and investment managers, recently announced updated integration capabilities with [RightCapital](#), a financial planning software that simplifies the complexity of financial planning for advisors and their clients.

Advyzon's integration with RightCapital sends data directly from Advyzon through API access and offers multiple capabilities, including connecting important information to client plans, allowing advisors to import client profiles from Advyzon into RightCapital, and sending RightCapital reports directly to Advyzon. Once integrated, investment account and life insurance data can be synced from Advyzon to RightCapital.

"We're thrilled that these enhanced data integrations with Advyzon will make it that much easier for our shared advisors and their clients to access important financial metrics at their fingertips," said Shuang Chen, co-founder and CEO of RightCapital.

Integration features include:

- Single Sign-On, where users can seamlessly log in from Advyzon to RightCapital without the need for separate login credentials. This streamlines the user experience and enhances security.
- Client Data Sync, where users can sync Advyzon CRM data including contact and net worth information with RightCapital. This ensures that financial advisors have access to up-to-date client information when performing financial planning and analysis within RightCapital.
- Report Sharing, where users can easily send reports generated in RightCapital to Advyzon with a simple click of a button. This feature simplifies the process of sharing financial plans, projections, and other reports with clients.

In addition, the latest update includes the ability to add RightCapital's Probability of Success widget to Advyzon's client dashboard and client portal. This widget was introduced in Advyzon to allow users to view the probability and confidence projections from RightCapital directly within the Advyzon platform, and includes two components:

- **Probability of Success:** This widget displays the results of a Monte Carlo simulation of 1,000 trials. It calculates the probability of a client not running out of money in any given year based on various financial scenarios. Additionally, it shows the median investment asset value at the end of the plan across the 1,000 trials. This information is crucial for assessing the likelihood of financial success.
- **Retirement Analysis:** The Confidence tab in this widget provides a range of outcomes from the Monte Carlo analysis over the course of the projection. This feature helps financial advisors and clients understand the variability and confidence associated with their retirement plans, making it easier to make informed decisions.

“We're excited to announce these enhancements to our software integration with RightCapital, furthering our mission of empowering Advyzon's advisors and end investors with the invaluable tools and data insights needed to confidently navigate their clients' financial journeys, at scale,” said Dirk Pearson, Chief Product Officer at Advyzon. “This upgraded integration offers seamless access to key plan metrics and documents from within Advyzon, delivering an even more holistic overview of the end investor's financial picture.”

Advyzon currently serves nearly 1,400 advisory firms, and their comprehensive solution – along with robust integrations like this – makes it easy for advisors to run their financial planning and investment advisory firms while managing their client accounts with efficiency and ease.

To learn more about the Advyzon and RightCapital integration, [please visit the RightCapital Help Center](#). To learn more about Advyzon's integrations, [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).

## **ABOUT RIGHTCAPITAL**

RightCapital's mission is to create Right Plans for Real People™. RightCapital is used by thousands of financial advisors to grow their practices and set their clients on the path to financial success. Founded in 2015, RightCapital is the fastest-growing financial planning software with the highest advisor satisfaction (Source: [The Kitces Report – 2023 AdvisorTech Study](#)). For more information, visit [www.RightCapital.com](http://www.RightCapital.com).

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