

NEWS

For Immediate Release

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Advyzon Investment Management (AIM) Adds Fidelity, Alpha Vee Solutions, KKM Financial, and Zacks

In addition, Advyzon’s TAMP adds two new professionals to the team

CHICAGO, IL (August 16, 2023) – [Advyzon Investment Management](#) (AIM), a turnkey asset management program (TAMP) under the [Advyzon](#) umbrella, recently added multiple new asset managers to their platform, including [Fidelity Investments](#), [Alpha Vee Solutions](#), [KKM Financial](#), and [Zacks Investment Management](#).

“My team and I are passionate about helping advisors,” said Meghan Holmes, Chief Operating Officer at AIM. “Our recent additions and enhancements have allowed us to provide easily accessible investment services within a fully integrated single platform that already serves as the technology hub of an advisor’s business. This eliminates the need for advisors to contract with outside managers or go to yet another platform for investment management services. It’s all about making advisor’s lives easier, and adding more managers to our platform is just another way we are doing exactly that.”

With these new strategists, AIM currently has over 150 strategies available to financial advisors in their [Nucleus model marketplace](#), from 20 asset managers. Fidelity, Alpha Vee, KKM, Zacks, Davis Selected Advisors, PMV Capital, Next Century Growth Investors, and Unified Investment Management join existing managers Advyzon Investment Management, Taylor Frigon Capital Management, WCM Investment Management, AllianceBernstein, WealthTrust Asset Management, Trademark Capital Management, Passage Global Capital Management, Principal Asset Management, Evestia Financial, Integrated Capital Management, Berkshire Asset Management, and Palisades Investment Partners, with more managers and strategies coming in the near future.

“Zacks Investment Management is very excited to be a part of Advyzon’s new model marketplace,” said Greg Murphy, Managing Director of National Sales at Zacks. “It was clear to us that Advyzon is an industry leader in providing comprehensive wealth management technology to financial advisors, and a firm that Zacks wanted to partner with. The launch of Nucleus provides

financial advisors and RIAs an end-to end solution that will create practice management efficiencies, while also giving them access to best-in-class money management.”

AIM EMPOWERS ADVISORS TO WORK ON THEIR BUSINESS, NOT IN IT

Advyzon Investment Management, which launched in March of 2022, was created to allow financial advisors to be more efficient via a better integrated user experience by providing TAMP services conveniently within Advyzon's single source code platform. AIM's managed portfolio solutions and high touch service model allow advisors to achieve operational efficiencies along with comprehensive investment selection and modeling, while empowering them to work on their business, not in it.

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 – plus a model marketplace with access to third party strategists via turnkey asset management with AIM – making it easy for advisors to run their financial planning and investment advisory firms while managing their client accounts with efficiency and ease. Advyzon currently serves nearly 1,400 advisory firms.

“We are excited to have joined AIM's platform to further our ability to connect with best-in-breed advisors and deliver our distinct Essential 40 model portfolio,” said Jeff Kilburg, founder and CEO of KKM Financial.

AIM offers risk-based models including active/passive mutual funds and ETFs, a tax-sensitive ETF only solution, an ESG active/passive model, an alternative model, and direct indexing, as well as tools and methodologies around tax optimization and tax loss harvesting. The firm has continued to build out additional investment products around all of these core offerings, as well as offer new strategies, as they've evolved over the course of their first year in business.

In addition to their investment offering, AIM provides a personalized service model to advisors based on their philosophy of insourcing versus outsourcing. AIM's service team members are personally assigned to individual advisors and take the time to truly understand their businesses, helping with the heavy lifting on the whole lifecycle of an account including account opening, billing, reporting, trading, data reconciliation, and acting as a custodial liaison.

NUCLEUS MODEL MARKETPLACE

While at the [T3 Technology Tools for Today conference](#) this past Spring, AIM announced the launch of the [Nucleus model marketplace](#), which is fully integrated into the comprehensive, award-winning Advyzon platform built on single source code. Adding a model marketplace enhances AIM's TAMP offering and moves Advyzon closer than ever to offering a fully comprehensive solution for financial advisors and investment managers to run their firms.

“Alpha Vee Solutions is excited to join Advyzon's model marketplace,” said Leigh Eichel, CEO of Alpha Vee. “Alpha Vee continues to experience hyper growth with its Risk Managed and growth research. Bringing these investable research tools to such an advanced and capable platform allows advisors more tools to grow their business and assist their clients. The new technology offered by the Advyzon team is exciting and compelling.”

The Nucleus model marketplace is structured for unified managed accounts (UMAs) and includes sleeve-level reporting and trading. Advisors have access to third-party strategists traded by AIM, with advisor built UMAs incorporating both advisor created models and strategist sleeves.

Users have access to over 150 risk-based models and SMAs from some of the top third-party management firms in the industry.

Single and multi-sleeve setup and trading include a variety of features, including cash management, dollar-cost averaging (DCA) and required minimum distribution (RMD) schedules, a 'Do Not Buy/Sell' securities list, equivalencies, carve outs, location optimization, maximum annual cap gain limit, onboarding tax management and ongoing tax loss harvesting, and wash sale alerts. AIM plans to add to Nucleus' features and capabilities in the coming months.

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

AIM ADDS TWO NEW PROFESSIONALS TO TEAM

In addition, Advyzon Investment Management recently announced that they are adding two key members to their growing team: [Kyle Craig](#) as Vice President of Platform Solutions and [Mike Ursitti](#) as Senior Vice President of Business Development. They join the current AIM team consisting of Lee Andreatta, MBA, Chief Executive Officer; Brian Huckstep, CFA, CFP®, Chief Investment Officer; Meghan Holmes, MBA, Chief Operating Officer; Alex Riedel, Managing Director, Head of Client Portfolio Management; and Tony Oulahan, Senior Vice President of Business Development.

Kyle Craig comes to AIM after 19 years at Charles Schwab, with deep knowledge of the TAMP space and experience working in specialized areas such as Third-Party Managed Accounts, TAMPs, IBDs, Outsource Agents, and Strategic Acquirers. He holds Series 7 and Series 63 licenses. Craig's role as Vice President of Platform Solutions is dedicated to growing and developing the Nucleus model marketplace: identifying and onboarding strategists, managing strategist relationships, and developing the platform, offering, and product.

Mike Ursitti joins AIM as Senior Vice President of Business Development, with over ten years of experience in the financial services industry. The first half of Ursitti's career was spent on the wholesaling side of the industry with Invesco and Capital Group (American Funds), while the second half has been spent on the technology side with positions at Oranj, SS&C Advent, and most recently, Vice President of Business Development with YieldX, who recently sold to FNZ. He holds a Bachelor of Science degree from University of Illinois.

"We're very excited to have both of these professionals join AIM," said Lee Andreatta, CEO and co-founder of AIM. "Their industry experience is extremely valuable, and both are perfect additions to our growing team."

ABOUT ADVYZON AND ADVYZON INVESTMENT MANAGEMENT

Advyzon provides comprehensive, intuitive, cloud-based, wealth management technology for independent financial advisors and registered investment advisors (RIAs). The Advyzon technology platform combines Advyzon Investment Management's turnkey asset management program (TAMP) with portfolio management, customizable performance reporting, trading and

rebalancing, client web portals, client relationship management (CRM), client billing, and document storage. AIM's managed portfolio solutions and high touch service model empowers financial advisors to achieve operational efficiencies along with comprehensive investment selection and modeling. 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 investment advisory services are provided by AIM, while some technology and administrative support services are provided by Advyzon. AIM's advisory services are available to financial advisors for use in managing assets for their clients only, and do not provide advisory services directly to retail investors. To learn more about Advyzon, visit www.Advyzon.com. To learn more about Advyzon Investment Management, visit www.AdvyzonIM.com.

ABOUT STRATEGISTS

With the exception of the propriety models offered by AIM, all other Strategists in the Nucleus program are independent companies that are unaffiliated with AIM and act as service providers to AIM.

There is no form of legal partnership, agency affiliation, or similar relationship between financial advisors using the program and the Strategists or AIM, nor is such a relationship created or implied by the information herein. Strategists are not involved with the preparation of the content supplied by AIM.

Statements made by third parties in this communication that indicate approval, support, or recommendation of Advyzon Investment Management (AIM) are considered endorsements. These endorsements are made by representatives of third party strategists, which are not current clients of AIM, and no cash compensation was paid to these parties for their statements. AIM receives compensation from third party strategists on the platform to cover the cost of AIM's administration and monitoring of the Models/Strategies. In addition, third party strategists on the AIM platform will receive compensation when advisors employ their strategies.

ABOUT FIDELITY INVESTMENTS

Fidelity Investments is an independent company, unaffiliated with Advyzon Investment Management. Fidelity Investments is a service provider to Advyzon to Investment Management.

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