

NEWS

For Immediate Release

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Advyzon Investment Management (AIM) Continues Growth and Adds Two Key Team Members to Staff

*Alex Riedel and Tony Oulahan are core to AIM’s mission of
serving independent financial advisors*

CHICAGO, IL (December 7, 2022) – [Advyzon Investment Management](#) (AIM), a turnkey asset management program (TAMP) under the [Advyzon](#) umbrella, recently announced that they are adding two key members to their growing team. Alex Riedel serves as Managing Director, Head of Client Portfolio Management and started on November 28th, 2022. Tony Oulahan serves as Senior Vice President of Business Development and started on July 5th, 2022. They join the current AIM team consisting of Lee Andreatta, MBA, Chief Executive Officer; Brian Huckstep, CFA, CFP®, Chief Investment Officer; and Meghan Holmes, MBA, Chief Operating Officer.

“We’re so excited to have both of these professionals join AIM,” said Lee Andreatta, CEO and co-founder of Advyzon Investment Management. “Alex is a known, highly sought-after commodity in the financial services industry and there’s no one better at helping advisors achieve their portfolio management goals on behalf of their end clients. Tony is an expert at understanding an advisor’s practice and helping to make recommendations based on technology and investment solutions. Both are extremely valuable additions to our team.”

ABOUT ALEX RIEDEL

Alex Riedel is Managing Director, Head of Client Portfolio Management with Advyzon Investment Management. Riedel’s key role is to consult with AIM advisors on investment options and portfolio construction in order to help them meet their client’s goals and scale their practice.

“I couldn’t be more excited to join the AIM team,” said Riedel. “AIM has integrated cutting edge TAMP technology with best-in-class investments. I look forward to my role of helping empower advisors to meet their clients’ goals and credibly scale their practices.”

Riedel brings over 25 years of investment experience to the firm. Before joining AIM, he began his career as a representative with Olde Discount Stockbrokers. Next, he joined Mercer Investment

Consulting as an analyst where he helped consult institutional defined benefits plans on asset allocation policy and manager selection. After that, Alex joined Ibbotson Associates where he was a featured asset allocation speaker, as well as the lead client service manager in configuring a web-based asset allocation tool for institutional clients. Following Morningstar's acquisition of Ibbotson Associates, Riedel built up and led Morningstar Investment Management's portfolio specialist team, which served as the liaison between the investment team and advisors.

Riedel earned his bachelor's degree in Finance with a concentration in Investments from the University of Illinois Urbana-Champaign.

ABOUT TONY OULAHAN

Tony Oulahan serves as the Senior Vice President of Business Development for Advyzon Investment Management and leads the firm's business development with RIAs across the country.

"AIM is a truly amazing team, and I'm honored to be a part of it," said Oulahan. "Advyzon technology is best in class and constantly improving. The advisor demand and reception of AIM in the marketplace has been outstanding."

Oulahan brings 15 years of investment experience to the firm, with the majority of that focused on the independent RIA space. He started his career as an investment wholesaler with Fifth Third Bank in the asset management division. From there, he moved on to wholesaling roles with Calamos Investments and Fund Evaluation Group. Most recently Tony was a Business Development Officer with Schwab, where he consulted with advisors throughout the process of going independent in order to help them achieve their entrepreneurial vision, and ultimately launch independent RIAs on the Schwab platform.

Tony has a bachelor's degree in Business Administration with a concentration in Finance from Thomas More University.

ADVYZON INVESTMENT MANAGEMENT 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 best-in-class 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, document storage, and 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. 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 award-winning comprehensive platform. Therefore, creating a TAMP was a natural evolution for Advyzon.

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 the year has unfolded.

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, doing the heavy lifting on the whole lifecycle of an account including account opening, billing, reporting, trading, data reconciliation, and acting as a custodial liaison.

To learn more about AIM, [please click here](#).

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 tech 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 best-in-class investment selection and modeling. To learn more about Advyzon, visit www.Advyzon.com. To learn more about Advyzon Investment Management, visit www.AdvyzonIM.com.

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