

Apex Fintech Solutions and Advyzon Expand Strategic Partnership with Advyzon Investment Management (AIM)

- *Designed to provide an advisor-centric solution that reduces administrative tasks*

Dallas, TX – December 5, 2024 - [Apex Fintech Solutions Inc.](#) (“Apex”), an innovation launchpad for the global investment ecosystem, and Advyzon, a comprehensive technology platform and portfolio management solution for financial advisors and investment managers, are thrilled to announce the expansion of their strategic partnership focused on integrating with [Advyzon Investment Management](#) (“AIM”), an investment solution provider under the Advyzon umbrella.

Through this partnership, advisors can leverage the straight through processing that Apex provides and utilize AIM’s Nucleus model marketplace and rebalancing solutions to streamline investment management processes. For clients, this new integration between Apex and AIM gives advisors the option to outsource or make better use of technology to handle day-to-day investment management operations helping modern advisory firms spend more time on the goals they have for their businesses.

"The expansion of our partnership with Advyzon highlights our shared vision of empowering advisors through technology and innovation," said Olivia Eisinger, Head of Advisory at Apex Fintech Solutions. "By collaborating with Advyzon Investment Management and integrating our proven straight-through processing solutions, we are providing advisors with an efficient platform. This allows them the flexibility to outsource or streamline investment management, enabling them to focus more on organic growth and spend more time expanding their businesses while meeting the expectations of today’s investors."

Key enhancements resulting from this partnership include:

- **Integrated Technology Solutions:** Combining Apex’s modern custodial services with Advyzon’s user-friendly platform, advisors can access a comprehensive suite of tools designed to streamline client management, trading, and reporting processes.
- **Increased Efficiency:** Advisors can benefit from reduced administrative burdens with automated workflows and straight through processing, allowing for more focus on client relationships and strategic planning.
- **Robust Support:** Both companies are committed to delivering exceptional support and resources to help advisors leverage these new tools effectively.

"Our ongoing partnership with Apex Fintech Solutions is a testament to our dedication to improving the advisory experience," said Lee Andreatta, CEO of Advyzon Investment Management. "We are excited about the opportunity to deepen our relationship with Apex and deliver an even more powerful, integrated platform designed to equip advisors with the tools needed to thrive in an increasingly complex market."

This partnership expansion builds on the [initial partnership announcement](#) in February 2024 and reinforces Apex and Advyzon's commitment to innovation and delivering modern solutions tailored to the needs of financial advisors. It will help enable future innovations as both companies continue to collaborate closely to enhance the advisor-client experience.

For more information on the expanded capabilities of Advyzon Investment Management and Apex Fintech Solutions, please visit www.AdvyzonIM.com and www.ApexFintechSolutions.com.

About Apex Fintech Solutions

Apex Fintech Solutions is a fintech powerhouse enabling seamless access, frictionless investing, and investor education for all. Apex's suite of scalable solutions fuel innovation and evolution for hundreds of today's market leaders, challengers, change makers, and visionaries. The Company's digital ecosystem creates an environment where clients with the biggest ideas are empowered to change the world. Apex works to ensure their partners succeed on the frontlines of the industry via bespoke solutions through its Apex Clearing™, Apex Advisor Solutions™, and Apex Silver™ brands. For more information, visit the Apex Fintech Solutions website: www.ApexFintechSolutions.com.

Brokerage services are provided by Apex Clearing Corporation, a wholly-owned subsidiary of Apex Fintech Solutions Inc, and an SEC registered broker dealer, member of FINRA and SIPC, and licensed in 53 states and territories.

About Advyzon

Advyzon provides comprehensive wealth management technology, as well as investment solutions through Advyzon Investment Management, LLC (AIM), for independent financial advisors, financial professionals, and financial institutions. The Advyzon platform combines portfolio management, customizable performance reporting, trading and rebalancing, client web portals, mobile apps, CRM, client billing, and secure document storage, along with investment solutions and a model marketplace offered by AIM. Advyzon also provides networking and practice management experience via the annual Advyzon Conference. 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. Advyzon's exceptional technology and 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 (AIM), visit www.AdvyzonIM.com.

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.

Statements made by Apex in this communication that indicate approval, support, or recommendation of AIM are considered endorsements. These endorsements are made by representatives of Apex, and Apex has a business relationship with Advyzon and AIM. No compensation was paid to these parties for their statements.

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