

NEWS

For Immediate Release

Media Contact:

Jonny Swift

Impact Communications, Inc.

913-649-5009

JonnySwift@ImpactCommunications.org



Citi Wealth and Advyzon Announce Strategic Agreement to Deliver a Global Unified Managed Account Program for Clients

Advyzon Investment Management (AIM) and Advyzon Enterprise Solutions selected to power global advisory platform

NEW YORK, NY (April 21, 2026) – Today, [Citi Wealth](#) announced a strategic agreement to partner with [Advyzon Enterprise Solutions](#) and [Advyzon Investment Management](#) (Advyzon) to deliver a Global Unified Managed Account (UMA) Program for Citi Wealth clients.

The development of Citi Wealth’s Global UMA Program, for Citi Private Bank, Wealth at Work, and Citigold & Citigold Private Client groups, across the firm’s global footprint spanning North America, LATAM, EMEA and APAC, is an important step forward to achieving Citi’s business growth objectives through the delivery of personalized advice to clients. This offering will further modernize and deliver industry-leading, personalized advice-driven solutions to clients, while simplifying the investments experience for clients, bankers, and advisors.

Citi Wealth currently offers a broad range of industry competitive Investment Advisory solutions which include a wide universe of Exchange Traded Funds, Mutual Funds, Separately Managed Accounts, alternative investments, and other solutions. This enhanced offering brings all of these investment solutions together into one UMA, delivering client choice and flexibility, while incorporating views from the firm’s Chief Investment Office.

It will offer clients several core differentiating features including multi-currency capabilities, access to both traditional and alternative investments, as well as onshore and offshore investment structures and the firm’s home office portfolios. In addition, it will integrate Citi Portfolio Solutions powered by BlackRock, which was [announced](#) in September 2025.

Additional client benefits from the delivery of the global UMA program include, but are not limited to: simple and efficient account opening; single account 360 degree view with one client agreement and one fee; as well as enhanced and comprehensive client reporting capabilities.

Advyzon was selected following a thorough and competitive search to identify a strategic partner, offering both state-of-the-art technology and a fully scalable, configurable, Artificial Intelligence-enabled, multi-currency, multi-jurisdictional Turnkey Asset Management Program (TAMP). Advyzon's modern architecture and capabilities include Model Management, Manager Marketplace, Tax Overlay and Direct Indexing, Trading, Portfolio Modelling, Rebalancing, Billing, and Reporting.

Keith Glenfield, Head of Investment Solutions, Citi Wealth, said: "Citi Wealth is excited about our strategic partnership with Advyzon to further enhance our differentiated global advisory offering to clients around the world. We believe that this is truly an industry innovation and a unique investment program, considering the global reach and combination of capabilities. Clients will be able to access the power of 'One Citi' and the breadth of our investment capabilities in a simplified and personalized investment program – enabling high levels of transparency and improved client outcomes. This Program, powered by Advyzon's leading agile and artificial intelligence powered technology, will streamline many aspects of Citi Wealth's core advice offerings and significantly improve the overall investment experience for clients."

Hailin Li, Ph.D., CFA®, Founder and CEO of Advyzon, said: "We're proud to partner with Citi Wealth on creating one global advisory platform that unites prospecting, account opening, unified management account/household, client reporting, and custodial capabilities. Trusted by more than 2,500 wealth management firms, our unified platform is built to scale, and we look forward to delivering personalized, scalable UMA capabilities and investment solutions to Citi clients worldwide."

The initial rollout of this offering will commence in the fourth quarter of 2026.

ABOUT CITI

Citi is a preeminent banking partner for institutions with cross-border needs, a global leader in wealth management and a valued personal bank in its home market of the United States. Citi does business in more than 180 countries and jurisdictions, providing corporations, governments, investors, institutions and individuals with a broad range of financial products and services. Additional information may be found at www.CitiGroup.com.

ABOUT ADVYZON AND ADVYZON INVESTMENT MANAGEMENT (AIM)

Advyzon is a unified global wealth management platform built on modern, open architecture for financial advisors, wealth management firms, broker-dealers, and family offices. Founded by CEO Hailin Li, Ph.D., CFA ®, Advyzon integrates AI powered portfolio management, performance reporting, trading, CRM, billing, and document storage within a single source platform and a cohesive data model, as well as investment solutions through Advyzon Investment Management (AIM). With 50% of its team dedicated to engineering and product development, Advyzon focuses on continuous innovation based on user feedback and industry needs. Advyzon serves various segments of the financial services industry through specialized solutions, including Advyzon Core for RIAs, Advyzon Enterprise for larger institutions, and Auria for family offices and ultra-high-net-worth clients. For more information, visit www.Advyzon.com and www.AdvyzonIM.com.

Advyzon Investment Management (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 references to investment advisory services are provided by AIM, while technology and administrative support services are provided by Advyzon. AIM’s advisory services are available to financial advisers for use in managing assets for their clients. AIM does not provide advisory services directly to retail investors. Professionals employed by Advyzon may refer qualified Advisory Firms to AIM. If a referred Advisory Firm engages AIM’s services, the referring professional will receive a referral fee.

Statements made in this communication that indicate approval, support, or recommendation of AIM are considered endorsements. These endorsements are made by representatives of Citi Wealth who are current clients of AIM. No direct or indirect compensation for this endorsement has been made to any representative of Citi Wealth.

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