

Innovayte and Advyzon Partner to Create Single, State-of-the-Art Technology Solution

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The platform is the first custodial solution built from a unified managed account framework that includes separately managed accounts, a model marketplace, and access to third-party asset managers



Innovayte

NEWS RELEASE BY INNOVAYTE

DALLAS and CHICAGO | August 12, 2024 08:30 AM Eastern Daylight Time

Innovayte, a custody and clearing firm that supports entrepreneurial registered investment advisors (RIAs) and wealth managers, and **Advyzon**, a comprehensive technology platform and portfolio management solution for financial advisors and investment managers, today announced the launch of their groundbreaking, state-of-the-art platform and model marketplace.

For Innovayte, Advyzon has created its first and only custodial back-end platform. The technology offers advisors a unique solution combining a separately managed account (SMA) and model marketplace with access to third-party asset managers – offered by **Advyzon Investment Management** (AIM), the turnkey asset management program under the Advyzon umbrella – all built from a unified managed account (UMA) framework.

“Technology is critical to helping RIAs reach their entrepreneurial goals,” said Cat Davies, Chief Executive Officer of Innovayte. “To truly empower advisors, we needed a new and fresh technology solution, not the same archaic legacy systems that fail to address the industry’s diverse needs. We’re excited to partner with Advyzon to give our advisors all the tools they need to grow and scale.”

A PARTNERSHIP TO PUSH THE ENTIRE INDUSTRY FORWARD

Advyzon’s intuitive, cloud-based technology platform offers a single solution that combines portfolio management, customizable performance reporting, trading and rebalancing, client web portals, CRM, client billing, and SEC-compliant document storage, customized mobile app and portal, as well as the model marketplace and investment management from Innovayte’s UMA/SMA platform via Advyzon Investment Management.

“We are proud to introduce the custody, clearing and investment management platform of the future,” said Lee Andreatta, CEO of Advyzon Investment Management. “When Innovayte

approached us about a partnership, we jumped at the opportunity to help usher in a new era for financial custody and clearing, plus investment management. Unfortunately, most firms use outdated technology, and we hope this partnership helps push the entire industry forward.”

The Innovayte platform is the only technology solution that can effectively serve the unique needs of high- and ultra-high-net-worth clients, given the UMA framework and its inclusion of a full rebalancer, model marketplace, and access to third-party managers.

Key features include:

- **Nucleus Model Marketplace**, which gives advisors access to third-party strategists, risk models, and advisor-created models.
- **Quantum Rebalancer**, which gives advisors multiple rebalance and tactical trade tools, including location optimization, cash management, and tax-loss harvesting.
- **Robust Trading Capabilities**, including tax overlay and direct indexing options.
- **SMA/UMA Structure**, featuring single and multi-sleeve reporting and trading.

To learn more about Innovayte, [click here](#). To learn more about Advyzon, [click here](#).

About Innovayte

Built from a heritage that spans a half century, Innovayte is a self-clearing custodian that fuels growth-minded advisors’ entrepreneurial spirit, helping wealth advisors to thrive. From cutting-edge technology through its proprietary Accelerayte platform, to pairing advisors with dedicated team members throughout our service model, Innovayte offers advanced technology and services with a human touch. For more information, visit [Innovayte.com](https://www.innovayte.com).

About Advyzon

Advyzon provides comprehensive, intuitive, cloud-based wealth management technology and investment management services for registered investment advisors (RIAs) and independent financial advisors. 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 (AIM). 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 [Advyzon.com](https://www.advzyon.com).

Custody and administrative services provided by ETC Brokerage Services. Innovayte is an affiliate of ETC Brokerage Services. Neither Advyzon nor AIM are affiliates of Innovayte.

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 Innovayte in this communication that indicate approval, support, or recommendation of AIM are considered endorsements. These endorsements are made by representatives of Innovayte, and Innovayte has a business relationship with Advyzon and AIM. No cash compensation was paid to these parties for their statements; however, Advyzon and AIM receive compensation for their technology and investment management services provided through this platform.

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