NEWS

For Immediate Release

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Advyzon Investment Management (AIM) Partners with Nebo Wealth to Create Turnkey, End-to-End Solution

Nebo Wealth's asset allocation and portfolio design platform adds Advyzon to provide advisors with trading, rebalancing, billing and reporting

CHICAGO, IL (February 15, 2024) – Advyzon Investment Management (AIM), a turnkey asset management program (TAMP) under the umbrella of comprehensive technology platform Advyzon, recently announced a partnership with Nebo Wealth, an award-winning asset allocation and portfolio design platform from global asset manager Grantham, Mayo, Van Otterloo & Co., LLC (GMO). AIM now powers and serves as a turnkey platform for Nebo Wealth, an end-to-end solution that enables Registered Investment Advisors (RIAs) to streamline and automate the process of delivering personalized portfolios for each and every client at scale.

"We were so excited to have the opportunity to serve as a foundational component for Nebo Wealth and help bring their turnkey platform to life," said Lee Andreatta, CEO of AIM. "Our technology was designed to make advisors' lives easier, and we're happy to bring the capabilities of Advyzon to Nebo and Advyzon advisors alike."

AIM extends the capabilities of the Nebo Wealth platform into a turnkey, technology-driven solution by including automated trading and rebalancing, performance reporting, billing, and advisor and client portals, as well as back-office support for account opening and administration. All of this empowers RIA firms to enhance client service, differentiate their value proposition, save time, drive operational efficiency, and foster growth in assets under management.

NEEDS-BASED OPTIMIZATION = GOALS-BASED WEALTH MANAGEMENT

At the heart of Nebo Wealth's framework is a proprietary multi-period, shortfall optimization engine that constructs portfolios designed to maximize the likelihood of achieving client goals. Nebo Wealth's pioneering portfolio construction engine redefines risk – not as volatility, but as "not having what you need, when you need it" – empowering RIAs to directly align their clients' financial plans with their investments. This results in portfolios that are better customized to the needs and circumstances of each client – all delivered through an open-architecture, technology-driven platform.

While the industry has made great strides in personalizing portfolios at the implementation level, (e.g., with custom indexing and tax management), Nebo Wealth brings personalization to the level of the whole portfolio, delivering client-specific asset allocation within the context of portfolio design customized to the investment philosophy of the advisory firm. The result is the ability to create truly personalized portfolios for each client that reflect the client's unique needs and circumstances with no more work than it takes to manage traditional model portfolios.

"Nebo Wealth represents a leap forward in goals-based wealth management and the future of personalized portfolios," said Martin Tarlie, Product Lead at Nebo Wealth. "The early-adopter Nebo advisors are having great success with personalizing client portfolios that seek to minimize the risk that matters most to the client. However, many of these early adopters have been asking for an end-to-end solution to better streamline and automate the entire process, especially trading and rebalancing – that's where Advyzon comes in."

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 for financial advisors 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 and/or turnkey asset management via AIM. This comprehensive solution makes it easy for advisors to run their financial planning and investment advisory firms while managing their client accounts with efficiency and ease. Advyzon is currently serving over 1,500 advisory firms.

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 couple of years 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.

To learn more about Advyzon Investment Management, please click here. To learn more about Nebo Wealth, 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 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 NEBO WEALTH AND GMO

Nebo Wealth is an award-winning, open architecture asset management platform, setting a new standard in goals-based wealth management. Nebo Wealth’s pioneering approach to asset allocation and portfolio design, driven by a proprietary risk optimization engine, delivers the personalization clients expect, along with the scale and efficiency advisory firms require to grow. Nebo Wealth Solutions, LLC is a wholly owned subsidiary of GMO.

GMO is a global investment manager that brings together focused expertise within its investment teams, industry-leading research, and client solutions and service to advance clients’ goals. Privately owned and renowned for its conviction in a valuation-based, long-term investment philosophy, GMO has been a partner to institutions, family offices, wealth managers, and consultants for over 40 years. To learn more about Nebo Wealth and GMO, visit www.NeboWealth.com.

DISCLAIMER

There is no form of legal partnership, agency affiliation, or similar relationship between Nebo and AIM, nor is such a relationship created or implied by the information herein.

Statements made by Nebo in this communication that indicate approval, support, or recommendation of Advyzon Investment Management (AIM) are considered testimonials. These testimonials are made by representatives of Nebo, which are current clients of AIM, and no cash compensation was paid to these parties for their statements. AIM receives compensation from Nebo to cover the cost of AIM’s services for Advisors that establish a relationship with Nebo Wealth.

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