

# Andes Wealth Technologies Announces Integration with Advyzon

*Andes Wealth integrates with Advyzon, empowering advisors with behavioral finance and comprehensive technology for enhanced client experiences.*

BOSTON, MA, US, June 6, 2023

/EINPresswire.com/ -- [Andes Wealth Technologies](#), the first company to combine behavioral finance with risk visualizations, empowering financial advisors to differentiate, satisfy Reg BI, and deliver deeply personalized services, announces a new integration with Advyzon, a leading all-in-one, cloud-based financial advisor technology platform.



Through this integration, Advyzon clients can seamlessly synchronize data from Advyzon to the Andes Wealth platform to improve workflows, operations, and the end-client experience.

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*John Mackowiak, Chief Revenue Officer at Advyzon*

Combining Andes Wealth's award-winning behavioral finance and risk solutions with Advyzon's comprehensive technology and investment solutions empowers RIAs to deliver more personalized services that meet the evolving needs of today's clients. The integration allows advisors to effortlessly move clients from risk tolerance assessment to the Investment Policy Statement, layering behavioral finance concepts throughout to enable a differentiated client experience that drives better outcomes.

“Andes Wealth is arming financial advisors with the tools they need to attract, better serve, and retain clients in today's volatile environment,” said John Mackowiak, Chief Revenue Officer at Advyzon. “This integration will enable advisors to have more meaningful conversations, especially during periods of market turmoil, and ultimately deepen their client relationships, which aligns perfectly with our vision of continuously adding value to the independent advisor experience.”

“For today’s independent advisors, differentiation is becoming increasingly critical as they grow and scale,” added Helen Yang, CFA, Founder & CEO of Andes Wealth Technologies. “By integrating our behavioral finance, risk tolerance and deep analytics capabilities with Advyzon’s premier all-in-one advisor tech solution, we can help them deliver the wealth management experience modern clients demand.”

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## About Andes Wealth Technologies

Andes Wealth Technologies provides an integrated risk, analytics and onboarding platform embedded with behavioral finance to help financial advisors differentiate and deliver deeply personalized advice. Inspired by Dr. Andrew Lo from MIT and his Adaptive Markets Theory, Andes Wealth Platform has received two patents and numerous awards, including the WealthManagement.com Industry Award, WealthTech Americas Award, Family Wealth Report Award, and ThinkAdvisor Luminaries Award.

To learn more, visit <https://andeswealth.com>.

## About Advyzon

Advyzon provides comprehensive, intuitive, cloud-based wealth management technology and investment management services for independent financial advisors and registered investment advisors (RIAs). 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. A team of entrepreneurs led by CEO Hailin Li, Ph.D., CFA<sup>®</sup>, Advyzon strives to deliver exceptional technology and unmatched service to improve the advisor experience.

To learn more about Advyzon, visit [www.Advyzon.com](http://www.Advyzon.com). To learn more about Advyzon Investment Management, visit [www.AdvyzonIM.com](http://www.AdvyzonIM.com).

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