



# Advyzon and Syntax Data Enter Custom Indexing Partnership



Sarah Grieco October 22, 2024

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### ***Comprehensive wealth platform adds direct indexing solutions for financial advisors***

**CHICAGO, October 22, 2024**--(BUSINESS WIRE)--Advyzon Investment Management (AIM), a turnkey asset management program (TAMP) under the umbrella of comprehensive technology platform Advyzon, and Syntax Data, a financial data and technology company that codifies business models into a relational system called Affinity® Data, today announced a partnership that will provide financial advisors with the ability to produce highly customized financial portfolios at scale.

AIM's indexing capabilities powered by Syntax's scalable platform offers advisors a comprehensive solution, covering every step of the index development process, integrated directly into Advyzon's all-in-one platform. Advyzon offers advisors a comprehensive solution that combines portfolio management, customizable performance reporting, trading and rebalancing, client web portals, CRM, client billing, and secure document storage - plus a model marketplace with access to third-party strategists via turnkey asset management with AIM.

Using AIM's indexing capabilities powered by Syntax Data, a proprietary system that includes accurate product line revenue data for more than 11,000 publicly traded companies, financial advisors can customize benchmark indices or build core, factor, thematic, and/or impact indices from scratch, enabling advisors to tailor investment solutions to match client preferences. Syntax Data's output includes back-tested performance, detailed statistical analysis, and an institutional-grade methodology document that provides total transparency into the investment process.

“We’re very excited to partner with Syntax Data and introduce direct indexing solutions into Advyzon,” said Lee Andreatta, CEO of Advyzon Investment Management. “The integration of Syntax’s indexing capabilities into Advyzon’s comprehensive platform gives us a clear advantage in providing a full range of investment-related services to RIAs that facilitate the organic growth of their practices – most notably, seamlessly taking a taxable account, creating a personalized index, and then transitioning it through AIM’s Tax Transition Optimization Engine designed to create tax alpha with the goal of maximizing after-tax returns.”

“We are proud to partner with Advyzon, adding our revolutionary financial data and technology to their platform,” said Syntax Data CEO Patrick Shaddow. “At a time when investment advisors face growing demands for customization and differentiation, the combination of Advyzon

and Syntax Data provides a timely and effective solution to meet the increasingly complex needs of investors.”

#### ABOUT SYNTAX

Syntax LLC is a financial data and technology company that codifies business models into a relational system called Affinity® Data. Syntax operates through three segments: Affinity® Data, Syntax Direct<sup>SM</sup>, and Syntax Indices. Using its patented FIS® technology inspired by systems sciences, the Affinity® Data segment offers the most comprehensive, granular, and accurate product line revenue data available on the market. The Syntax Direct<sup>SM</sup> segment then uses this abundance of data to facilitate the near instantaneous creation and ongoing management of boundless direct indexing solutions and rules-based equity portfolios through a fully automated platform. The Syntax Indices segment offers customized and proprietary indices, including core global benchmarks and micro- and macro-thematic, smart beta, defined outcome, and target volatility indices. These indices are foundational for a range of financial products, such as ETFs, UITs, and structured products. To learn more, visit [www.SyntaxData.com](http://www.SyntaxData.com).

#### ABOUT ADVYZON

Advyzon provides comprehensive wealth management technology, as well as investment solutions through Advyzon Investment Management, LLC (AIM), for RIAs and independent financial advisors. 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](http://www.Advyzon.com). To learn more about Advyzon Investment Management (AIM), visit [www.AdvyzonIM.com](http://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 Syntax Data in this communication that indicate approval, support, or recommendation of Advyzon Investment Management (AIM) are considered endorsements. These endorsements are made by representatives of Syntax Data, and Syntax Data has a business relationship with AIM. No cash compensation was paid to these parties for their statements; however, AIM receives compensation from Syntax Data for services related to AIM's indexing offering and may receive compensation to cover the cost of AIM's administration and monitoring of their Models/Strategies included in AIM's Model Marketplace program. If advisors engage with AIM, both AIM and Syntax will receive compensation when advisors employ these offerings.