

# A Clean Sweep of the 2025 Kitces Report

VOTED #1  
IN FIVE  
CATEGORIES

Performance Reporting  
Client Portal  
CRM  
Portfolio Management  
File Sharing

Scroll down to continue.

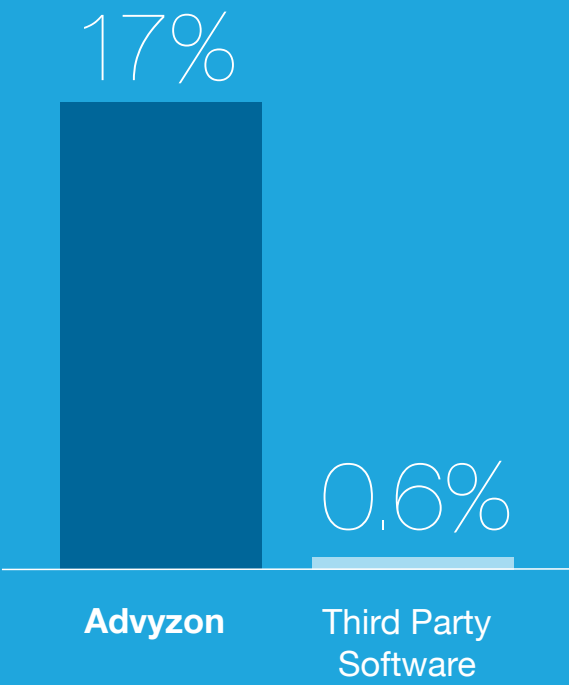
## Advyzon Surging Ahead

Kitces Research named Advyzon a Rising Star and Standout, as well as #1 across five categories in its 2025 report—the most significant shift in AdvisorTech in years.

The biggest proof point is Performance Reporting, where Advyzon pulled ahead with **17%\* momentum compared with just 0.6% for third-party software—nearly 30 times higher.** With churn near zero, firms that switch stay—and Advyzon’s market share keeps climbing every quarter.

“With 89% of advisors preparing to overhaul their tech stacks this year, the industry is bracing for a shake-up.\*

\* Trailing twelve month momentum



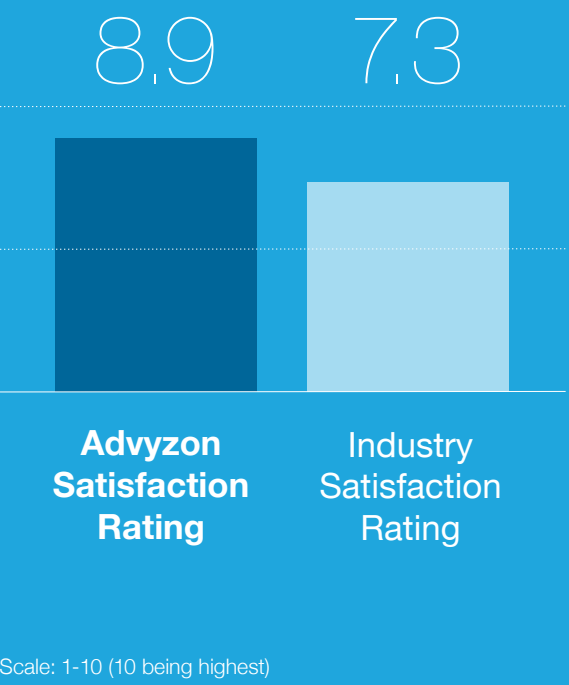
## Performance Reporting

Clear, Reliable Reports.

Performance Reporting ranks lowest in advisor satisfaction, yet it’s one of the most critical parts of the client experience. Advyzon flips the script with a high satisfaction and value score and recognition as an “Optimistic” Provider to Watch.

- Branded reports with key performance data
- Automated scheduling to streamline delivery
- Shareable reports posted directly to the client portal

“Advyzon appears well positioned to lead that disruption (declining satisfaction with legacy tools), boasting the highest satisfaction scores in performance reporting.\*



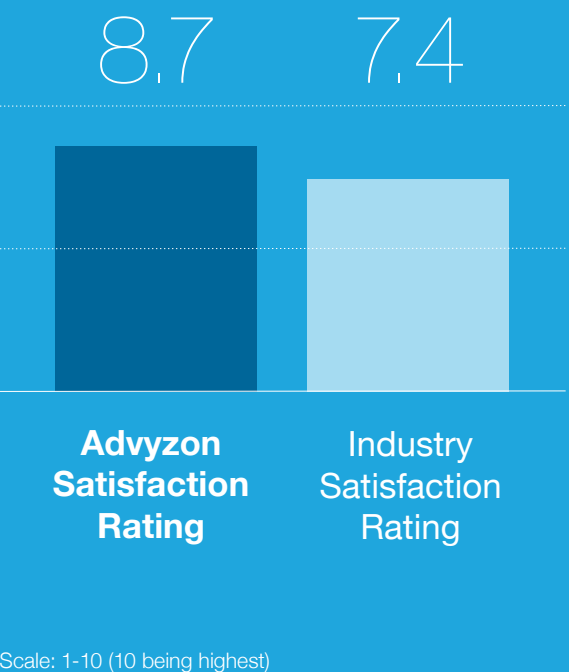
## Client Portal

Simple, Seamless Access.

Legacy portals feel bolted on and disjointed. Advyzon’s all-in-one design delivers the #1-rated client portal, giving firms a unified, branded hub that builds trust and elevates every interaction.

- Intuitive design for effortless access
- Integrated tools that ease advisor workload
- Personalized experience with secure, shareable reports

“The Kitces Report identified Advyzon as a cornerstone for business scaling and recognized as best-of-breed based on category ratings.\*



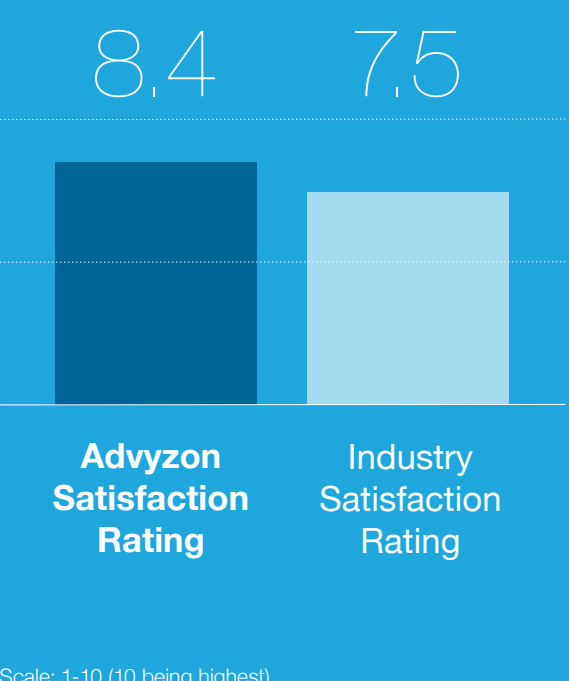
## CRM

Integrated. Scalable. Built to Grow.

A true all-in-one platform that connects client notes, workflows, portfolios, reporting, and billing in one seamless hub.

- Recognized as a Rising Star
- Fully integrated workflows and client data
- Cleaner processes, better client experience

“Advyzon delivered the highest overall CRM satisfaction scores.\*



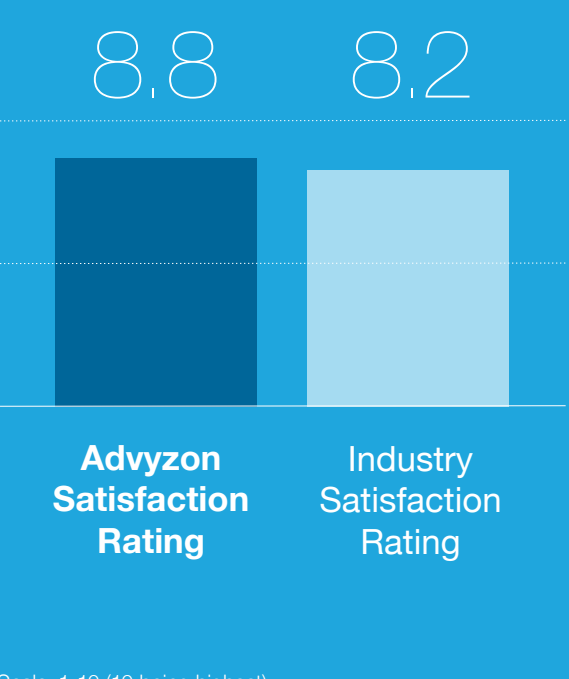
## Portfolio Management

One Platform. Multiple Capabilities.

Advyzon has emerged as a new market leader in portfolio management, resolving the industry-wide all-in-one vs. best-in-class dilemma by delivering both flexibility and consolidation on a single platform.

- Recognized as a Rising Star and Standout
- Reliable billing and AUM tools built-in
- Rebalancing, CRM, and billing in one interface

“Advyzon’s platform, built on unified data, connects portfolios, performance, and planning in one place while consistently earning among the highest satisfaction scores in the category.\*



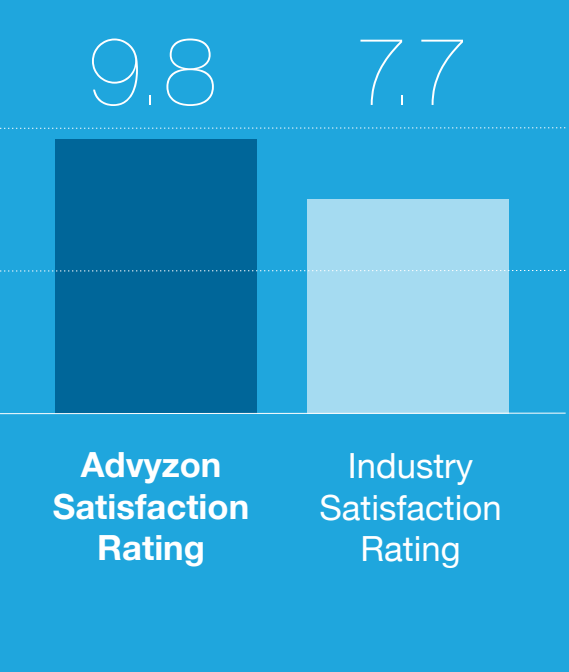
## File Sharing

Secure, Simple, Integrated.

File sharing should be seamless, not split across multiple systems. Advyzon delivers the highest satisfaction rating in file sharing with one unified experience built into the platform.

- Integrated with CRM and portfolio management
- Granular permissions and organized file structures
- Secure collaboration without third-party systems

“Advyzon is the single highest-rated provider in this space, with client file sharing delivered as an extension of its integrated CRM and portfolio management capabilities.\*



One Platform.  
One Easy Solution.  
One Dedicated Team.

Making business easier for you and better for your clients.

LEARN MORE

Advyzon

\* Source: The Kitces Report, Vol. 1, 2025—The Technology That Independent Financial Advisors Actually Use and Like