

WealthManagement.com 2022 Industry Awards Finalists/Honorees

AWARD CATEGORY	COMPANY	INITIATIVE OR INDIVIDUAL
ASSET MANAGERS		
Alternatives	AXS Investments Hamilton Lane Nationwide Simplify StepPeak Wealth StepStone Conversus LLC	Inflation Sensitive ETF Private Markets 101 Risk-Managed Income ETF Suite Democratizing Access to Better Portfolios SteelPeak Capital Opportunity Fund StepStone Conversus
Charitable Giving/Donor Advised Funds	Bank of America Fiduciary Trust Company Schwab Charitable	Maximizing Clients Giving Donor Advised Funds The Schwab Charitable Giving Guide
Chief Executive Officer of the Year	Defiance ETFs Diamond Hill Ethic First Ascent Asset Management FS Investments Humankind Investments Innovator ETFs Simplify SpiderRock Advisors Voya Investment Management	Heather Brilliant Doug Scott Scott Mackillop Michael Forman James Katz Bruce Bond Paul Kim Eric Metz Christine Hurlstellers Kelly Vives
Chief Marketing Officer of the Year	Allspring Global Investments First Ascent Asset Management Russell Investments	Ben Sullivan Mollie Jensen
Corporate Social Responsibility	FS Investments John Hancock Investment Management	Philadelphia Financial Scholars MLK Scholars Program
Digital Marketing Campaign of the Year	Cohen & Steers Macquarie Asset Management Natixis Investment Managers Principal Global Investors Americh Massena	Real Assets Digital Marketing Campaign The Sharpe Advisor Private Markets Guide Sustainable Future Digital Marketing Campaign Speaker Series and Digital Marketing Campaign Diversity, Equity and Inclusion Campaign DEI Shareholder Engagement
Diversity, Equity and Inclusion	Fiduciary Trust International Hamilton Lane Morgan Stanley Nationwide Financial	Emerging Talent Internship Program The Equity Collective Nationwide Retirement Institute Diverse Markets Initiative
ETFs	AXS Investments Humankind Investments Innovator ETFs Janus Henderson Investors KraneShares Simplify TrueShares ETFs VanEck WisdomTree	Inflation Sensitive ETF Humankind US Stock ETF Defined Outcome ETF Sustainable Solutions E-Fs Launch Climate/ESG ETF Democratizing Access to Better Portfolios Structured Outcome E-Fs Digital Asset Fund Expansion Expanded ETF Offerings
Fixed Income	IndexIQ Nuveen	ESG Bond ETF Global Fixed Income Impact Report
New Product Development	AXS Investments Defiance ETFs FS Investments Hamilton Lane Masterworks Morningstar Investment Services LLC New York Life Investments / IndexIQ VanEck	Inflation Sensitive ETF NFTZ, NFT ETF Chiron Real Asset Fund Private Assets Fund (PAF) Diversified Art Portfolio U.S. Sustainability Float Focus Portfolios (SMA) Dual Impact ETF Suite Expansion Digital Asset Fund Expansion
Real Estate (including REITs)	Cadre Cohen & Steers Noyack Capital Eaglebrook Advisors	Direct Access Fund REIT Academy REIT Investment Using Cryptocurrency Crypto SMA Platform
Separate Accounts	Kingsley Capital Management, LLC Russell Investments	Sub-Advisory for RIA's Russell Personalized Managed Accounts (PMA)
Socially Responsible Investing (SRI) / Impact Investing	Ervesnet PMC First Ascent Asset Management FlexShares Humankind Investments Morgan Stanley Wealth Management Investment Solutions New York Life Investments / IndexIQ	ESG Due Diligence Framework Flat Fee ESG Initiative ESG and Climate Suite Humankind US Stock ETF Impact Signal Dual Impact ETF Suite Expansion
Thought Leadership Advisor Education	Cohen & Steers Fiduciary Trust Company Guggenheim Investments Hartford Funds Macquarie Asset Management Masterworks Morningstar Investment Services LLC Nationwide Nuveen Principal Global Investors Elm Wealth VanEck	Real Assets Thought Leadership Campaign Advisor-Client Engagement Insights Behavioral Finance Initiative Human-centric Investing Podcast Think Again Podcast Art as an Asset Class Investment Management Symposium Legacy Essentials RealAssets - Global Insights for Real Estate Investors Speaker Series Investor calculators Digital Asset Fund Expansion
BROKER-DEALERS (All)		
Chief Marketing Officer of the Year	Cambridge Investment Research, Inc. Cetera Financial Group Oppenheimer & Co. Inc. Atria Wealth Solutions Bernstein Private Wealth Management	Jeffrey Vacuqa Michael Juna Joan Kinsbury John P. Harhardt Tuppy Russo
Chief Technology Officer of the Year	Atria Wealth Solutions Bernstein Private Wealth Management	John P. Harhardt Tuppy Russo
Corporate Social Responsibility	Cambridge Investment Research, Inc. Sigma Financial Corporation	Cambridge Community of Women Scaling Ukraine Relief Charitable Donations Campaign
Digital Marketing Campaign of the Year	Atria Wealth Solutions Janney Montgomery Scott Voya Financial	Piggback Power Investor Events Voya's Hire thru Retire: A Health and Wealth Podcast
BROKER-DEALERS (1,000 Advisors or More)		
Chief Executive Officer of the Year	Cambridge Investment Research, Inc. Cetera Financial Group Commonwealth Financial Network J.P. Morgan Wealth Management Lincoln Financial Network LPL Financial Merrill Wealth Management Advisor Group Inc. LPL Financial Raymond James Atria Wealth Solutions Commonwealth Financial Network LPL Financial Raymond James Atria Wealth Solutions	Ann Webber Adam Antoniadis DE Program Advisor Development Program Inclusion and Diversity Initiatives Black Advisor Voices Video Series Diverse Viewpoints Business Valuation and Analytics Assessment M&A Solutions Practice Exchange Remun Service Virtual Administration Program Paraplanning Services Remote Admin Extension Unio Advisor Platform Clientworks Meeting Manager Philanthropy Study
Diversity, Equity and Inclusion	J.P. Morgan Wealth Management Lincoln Financial Network LPL Financial Merrill Wealth Management Advisor Group Inc. LPL Financial Raymond James Atria Wealth Solutions Commonwealth Financial Network LPL Financial Raymond James Atria Wealth Solutions	U.S. Sustainability Float Focus Portfolios (SMA) Dual Impact ETF Suite Expansion Digital Asset Fund Expansion Expanded ETF Offerings
Practice Management	Advisor Group Inc. LPL Financial Raymond James Atria Wealth Solutions Commonwealth Financial Network LPL Financial Raymond James Atria Wealth Solutions	Business Valuation and Analytics Assessment M&A Solutions Practice Exchange Remun Service
Service	Atria Wealth Solutions Commonwealth Financial Network LPL Financial Raymond James Atria Wealth Solutions	Virtual Administration Program Paraplanning Services Remote Admin Extension Unio Advisor Platform Clientworks Meeting Manager Philanthropy Study
Technology	Atria Wealth Solutions LPL Financial	Unio Advisor Platform Clientworks Meeting Manager Philanthropy Study
Thought Leadership	Bank of America Cambridge Investment Research, Inc. Cetera Financial Group Voya Financial Cetera Financial Group Commonwealth Financial Network	Cambridge Stronger Podcast Fed Monitor Dashboard and Fed-o-meter Voya's Hire thru Retire: A Health and Wealth Podcast Accesslink Virtual Transition Support (VTS)
Transition Support	Cetera Financial Group Commonwealth Financial Network	Accesslink Virtual Transition Support (VTS)
BROKER-DEALERS (Fewer Than 1,000 Advisors)		
Chief Executive Officer of the Year	Prospera Financial Services Sigma Financial Corporation Bernstein Private Wealth Management Janney Montgomery Scott Bernstein Private Wealth Management Janney Montgomery Scott PEAK Reqs, LLC Prospera Financial Services American Portfolios Financial Services, Inc. Bernstein Private Wealth Management Copper Financial Janney Montgomery Scott American Portfolios Financial Services, Inc. Bernstein Private Wealth Management	Tim Edwards and David Stringer Jenny Rydell AJS Collective IMACT/Convergent Firm Automated Client Review Book Service Financial Planning Masterclass Series Online Marketing Program Protect Engagement Score Platform Upgrades Mobile App Wealth Management 360 Portal Prospect Site Market Commentary Tax Management Campaign
Diversity, Equity and Inclusion	Bernstein Private Wealth Management Janney Montgomery Scott Bernstein Private Wealth Management Janney Montgomery Scott PEAK Reqs, LLC Prospera Financial Services American Portfolios Financial Services, Inc. Bernstein Private Wealth Management Copper Financial Janney Montgomery Scott American Portfolios Financial Services, Inc. Bernstein Private Wealth Management	Automated Client Review Book Service Financial Planning Masterclass Series Online Marketing Program Protect Engagement Score Platform Upgrades Mobile App Wealth Management 360 Portal Prospect Site Market Commentary Tax Management Campaign
Practice Management	Janney Montgomery Scott Bernstein Private Wealth Management Janney Montgomery Scott PEAK Reqs, LLC Prospera Financial Services American Portfolios Financial Services, Inc. Bernstein Private Wealth Management Copper Financial Janney Montgomery Scott American Portfolios Financial Services, Inc. Bernstein Private Wealth Management	Automated Client Review Book Service Financial Planning Masterclass Series Online Marketing Program Protect Engagement Score Platform Upgrades Mobile App Wealth Management 360 Portal Prospect Site Market Commentary Tax Management Campaign
Technology	American Portfolios Financial Services, Inc. Bernstein Private Wealth Management Copper Financial Janney Montgomery Scott American Portfolios Financial Services, Inc. Bernstein Private Wealth Management	Automated Client Review Book Service Financial Planning Masterclass Series Online Marketing Program Protect Engagement Score Platform Upgrades Mobile App Wealth Management 360 Portal Prospect Site Market Commentary Tax Management Campaign
Thought Leadership	Janney Montgomery Scott American Portfolios Financial Services, Inc. Bernstein Private Wealth Management	Automated Client Review Book Service Financial Planning Masterclass Series Online Marketing Program Protect Engagement Score Platform Upgrades Mobile App Wealth Management 360 Portal Prospect Site Market Commentary Tax Management Campaign
COMPLIANCE/LAW FIRMS		
Industry	ComplySci MarketCounsel Consulting Winnow Solutions, LLC	Employee Compliance Platform Mark by MarketCounsel State Law Compliance Database
CUSTODIANS		
Alternative Asset	Equity Advisor Solutions OpenAlt	Cryptocurrency Trading Private Market Custodian
Diversity, Equity and Inclusion	BNY Mellon's Pershing Schwab Advisor Services	Minority Business Enterprise Client Council DEI Program for RIAs
Practice Management	BNY Mellon Pershing LPL Financial Schwab Advisor Services BNY Mellon Pershing Fidelity Investments Schwab Advisor Services Fiduciary Trust Company Schwab Advisor Services	M&A Strategy Program Business Strategy Services RIA Firm Design Blueprint Consultation for Advisors in Transition Net360 Intelligent Search Enhanced Technology Offerings Schwab's Digital Onboarding Advisor Community Conversations BCE Webcast Series
Technology	BNY Mellon Pershing Fidelity Investments Schwab Advisor Services Fiduciary Trust Company Schwab Advisor Services	M&A Strategy Program Business Strategy Services RIA Firm Design Blueprint Consultation for Advisors in Transition Net360 Intelligent Search Enhanced Technology Offerings Schwab's Digital Onboarding Advisor Community Conversations BCE Webcast Series
Thought Leadership	Fiduciary Trust Company Schwab Advisor Services	Schwab's Digital Onboarding Advisor Community Conversations BCE Webcast Series
DISRUPTORS		
Industry	Cadre Choir Facet Wealth Finace of America Reverse, LLC GMO Indyfin Masterworks Orion The American College of Financial Services YourStake	Direct Access Fund Spotlighting New Voices Financial Planning for People the Industry Ignores CE and Educational Components Nebo Investor Experience Platform Ecosystem of Art-based Product Solutions Disrupting Data Delivery C-Suite Diversity Leadership Program ESG Investing Toolkit for Advisors Crypto SMA Platform Join MAP Health + Summit's WealthOS Securities-Based Lending Platform Estate Administration Automation Platform Commercial Banking Digital Experience
Technology	Eaglebrook Advisors Join IncomeConductor (WealthConductor LLC) Summit Wealth Systems Supernova Technology™ Trustate Wealth Access	Crypto SMA Platform Join MAP Health + Summit's WealthOS Securities-Based Lending Platform Estate Administration Automation Platform Commercial Banking Digital Experience
FAMILY OFFICES		
Client Initiative	Geller Advisors LLC Pathstone	myGellerCFO Pathstone ARROW
Thought Leadership	Americh Massena Key Family Wealth Pathstone	Diversity, Equity and Inclusion Campaign Succession Planning Strategy Thought Leadership Campaign
INDIVIDUAL RIA FIRM LEADERS		
Chief Executive Officer of the Year	Allworth Financial Beacon Pointe Advisors Edelman Financial Engines Hightower Advisors Mercer Advisors Merit Financial Advisors SanctuaryEAD SignatureFD Wealth Enhancement Group Wipfl Financial Advisors Aspiriant Beacon Pointe Advisors Carson Group Hightower Advisors SignatureFD Americh Massena HCR Wealth Advisors SignatureFD Adhesion Wealth Intrepid Wealth Partners Journey Strategic Wealth Manhattan West OneDigital Investment Advisors Allworth Financial Beacon Pointe Advisors Merit Financial Advisors OneDigital Investment Advisors SageView Advisory Group Stratos Wealth Holdings The Colony Group Wealth Enhancement Group Wealthspire Advisors Beacon Pointe Advisors Carson Group Falcon Wealth Planning, Inc. HCR Wealth Advisors Intrepid Wealth Partners Mercer Advisors Optas Capital Robertson Stephens Waddell & Associates Wedmont Private Capital Wipfl Financial Advisors Carson Group Intrepid Wealth Partners Keel Point Mattreiner.com Mercer Advisors Sunpointe Investments SVB Private Thrivent Advisor Network	Scott Hanson Shannon Eusey Larry Raffone Bob Oros Dave Welling Rick Kent Jim Dickson Heather Fortner Jeff Dekko Jeff Pierce Cammie Doder Allison Hillgren Warner Mary Kate Gulick Meghan McCartan Crystal Mathis David Vaughan Alyssa Phillips Walter Chamblae Barrett Ayers, President Derek Notman, Founder and CEO Penny Phillips, President and Co-Founder Lorenzo Esparza, CEO Vince Morris, President Pat McClain, Co-Founder and Co-CEO Matthew Cooper, President Kay Lynn Mayhew, President Vince Morris, President Randall Long, Founder and CEO Lou Camacho, COO of Stratos Wealth Holdings and President of Stratos Wealth Enterprises Zinovy Iosovitch, President and Chief Services Officer Jeff Dekko, CEO Michael LaMena, CEO Kevin DiSano, Chief Growth Officer Ana Trujillo Limón, Director of Coaching & Advisor Content Nick Engelbart, Chief Financial Officer Gabriel Shahin, Principal and Founder Michelle Katzen, Managing Director Derek Notman, Founder and CEO Kara Duckworth, Managing Director of Client Experience Ryan Klippel, Head of Social Impact / Financial Planner Mallon FitzPatrick, Managing Director, Principal Teresa J.W. Bailey, Director of Development and Senior Wealth Strategist James Pelletier, Co-founder Raifa Hasan, Chief Investment Officer Ron Carson, CEO and Founder Derek Notman, Founder and CEO Steven L. Skancke, Ph.D., Chief Economic Advisor Matt Reiner, Owner and Creator Donald Calcagni, Chief Investment Officer Michael Pompani, Founder and CIO Sharon Saccoccia, Chief Investment Officer Carolyn Armitage, Head of Thrivent Advisor Network
Diversity, Equity and Inclusion	Allworth Financial Beacon Pointe Advisors Edelman Financial Engines Hightower Advisors Mercer Advisors Merit Financial Advisors SanctuaryEAD SignatureFD Wealth Enhancement Group Wipfl Financial Advisors Aspiriant Beacon Pointe Advisors Carson Group Hightower Advisors SignatureFD Americh Massena HCR Wealth Advisors SignatureFD Adhesion Wealth Intrepid Wealth Partners Journey Strategic Wealth Manhattan West OneDigital Investment Advisors Allworth Financial Beacon Pointe Advisors Merit Financial Advisors OneDigital Investment Advisors SageView Advisory Group Stratos Wealth Holdings The Colony Group Wealth Enhancement Group Wealthspire Advisors Beacon Pointe Advisors Carson Group Falcon Wealth Planning, Inc. HCR Wealth Advisors Intrepid Wealth Partners Mercer Advisors Optas Capital Robertson Stephens Waddell & Associates Wedmont Private Capital Wipfl Financial Advisors Carson Group Intrepid Wealth Partners Keel Point Mattreiner.com Mercer Advisors Sunpointe Investments SVB Private Thrivent Advisor Network	Automated Client Review Book Service Financial Planning Masterclass Series Online Marketing Program Protect Engagement Score Platform Upgrades Mobile App Wealth Management 360 Portal Prospect Site Market Commentary Tax Management Campaign
Practice Management	Janney Montgomery Scott Bernstein Private Wealth Management Janney Montgomery Scott PEAK Reqs, LLC Prospera Financial Services American Portfolios Financial Services, Inc. Bernstein Private Wealth Management Copper Financial Janney Montgomery Scott American Portfolios Financial Services, Inc. Bernstein Private Wealth Management	Automated Client Review Book Service Financial Planning Masterclass Series Online Marketing Program Protect Engagement Score Platform Upgrades Mobile App Wealth Management 360 Portal Prospect Site Market Commentary Tax Management Campaign
Technology	American Portfolios Financial Services, Inc. Bernstein Private Wealth Management Copper Financial Janney Montgomery Scott American Portfolios Financial Services, Inc. Bernstein Private Wealth Management	Automated Client Review Book Service Financial Planning Masterclass Series Online Marketing Program Protect Engagement Score Platform Upgrades Mobile App Wealth Management 360 Portal Prospect Site Market Commentary Tax Management Campaign
Thought Leadership	Janney Montgomery Scott American Portfolios Financial Services, Inc. Bernstein Private Wealth Management	Automated Client Review Book Service Financial Planning Masterclass Series Online Marketing Program Protect Engagement Score Platform Upgrades Mobile App Wealth Management 360 Portal Prospect Site Market Commentary Tax Management Campaign
INDUSTRY ASSOCIATIONS	Alliance for Life Income National Association of Personal Financial Advisors (NAPFA)	Education Campaign DEI Training and Certificate Program
INDUSTRY RESEARCH PROVIDERS	Alliance for Lifetime Income DeVoe & Company New Constructs, LLC The American College of Financial Services	Retirement Income Research RIA Talent Management Study Robo-Analyst Credit Ratings Black Women, Trust, and the Financial Services Industry
Service	Allianz Life Insurance Company of North America Fiduciary Insurance Services, LLC. Nassau Financial Group Crump Life Insurance Services CUNA Mutual Group Ervesnet, Inc. Pipeline Jackson National Life Insurance Co.	The Conversations That Matter Project DC Retirement Income Consortium Amplifying Diverse Voices in Retirement Planning Digital Transaction Center Elevate Insurance Exchange iSolve Retirement Expense and Income Calculator
Technology	Crump Life Insurance Services CUNA Mutual Group Ervesnet, Inc. Pipeline Jackson National Life Insurance Co.	The Conversations That Matter Project DC Retirement Income Consortium Amplifying Diverse Voices in Retirement Planning Digital Transaction Center Elevate Insurance Exchange iSolve Retirement Expense and Income Calculator
INVESTMENT BANKS/LENDERS/SUCCESSION PLANNING CONSULTANTS		
MARKETING PR FIRMS	PPC LOAN Wise Rhino Group	Nextgen Financing and Consulting Enterprise Value Evaluation and M&A Advisory
Digital Campaign of the Year	Content ISI FIComm partners Idea Decanter & Kall Collective Impact Communications, Inc. Intention.ly Three Crowns Copywriting and Marketing	#ETFinflu #Top50 Podcast Awards Retirement Depression Video Campaign NAPFA Playbook Income Investing Through Social Media Campaign Wealth Access Customer Data Platform Campaign
NON-CUSTODIAL RIA SUPPORT PLATFORMS	Carson Group Carson Group Dynasty Financial Partners RFG Advisory	DEI Initiative Excell 2021 CEO Program RFG Assist
RETIREMENT PLAN SUPPORT AND ADVISOR SERVICES		
401(k) Service	Empower Morningstar Investment Management LLC Morningstar Investment Management LLC	Empowering America's Financial Journey (EAFJ) Advisor Managed Accounts Personal Target Date Funds
401(k) Technology	intelligents inc. Manifest PCS Retirement, LLC Ponters Vestwell Voya Financial HUB Retirement and Private Wealth OneDigital Investment Advisors Franklin Templeton Investments Natixis Investments Empower Income America John Hancock Retirement	Digital 401(k) Transfer Tool The Advisor Lab 401(k) Toolkit® Hold Away Account Management Vestwell Managed Accounts Voya's myHealth&Wealth Personalized Benefits Guidance Vince Morris Voice of the American Worker Program Center for Investor Insight Sustainable Future Funds Marketing Program Advisor Managed Account Platform Income America Platform Retirement Plan Advisor Support
SUCCESSION/OWNERSHIP TRANSITION SERVICES - NON-CUSTODIAN/BROKER-DEALER	Carson Group DeVoe & Company	Succession Plan GrowthBuilder
TAMPS		
Model Marketplaces	Amplify Technology, LLC SMARTX Advisory Solutions The Pacific Financial Group THOR Financial Technologies UX Wealth Partners	Enhanced UMA Trading Interface Diversified Model Marketplace with OCIO Overlay Strategy PLUS SDBA Model Portfolio Program THOR's Model Marketplace AI Driven Platform
TAMPS	AssetMark Eaglebrook Advisors Matson Money Smartleaf Asset Management, LLC SMARTX Advisory Solutions Tactive	Digital Marketing Crypto SMA Platform Matson Money TAMP A Menu of Options New Operational Efficiency Applications Tactical Robo Advisory TAMP
TECHNOLOGY PROVIDERS		
Alternative Investment Platforms	Capital InvestIX Aidestified LLC CAIS FactSet Smashr TIFIN benjamin Bento Engine CogniCor Hubly Orion Panoramix Practifi Asset-Map CAIS La Meer Inc. Marstone Inc. Orion RightCapital Riskalyze SMARTX Advisory Solutions Snappy Kraken TIFIN Wealth Access Flyer Financial Technologies intelliflo Smashr SMARTX Advisory Solutions CAIS MyVest RightSize Solutions Andes Wealth Technologies PreciseFP ProgressSoft Corporation Mirador, LLC Orion Panoramix SS&C Black Diamond Wealth Platform Wealth Access Broadridge ComplySci Docupace Hearsay Systems InvestorCOM Inc. Smashr SmartRIA SS&C Black Diamond Wealth Platform Winnow Solutions, LLC AppCrown Practifi Scienc SS&C Salentica Flourish THOR Financial Technologies Entreda EverSafe Ervesnet, Inc. Snappy Kraken Vestmark White Glove	Global Distributed Ledger Solution Trading Platform for Pre-IPO Companies AI-Driven Referrals CAIS IQ Fund and ETF Screener Smashr Communications Intelligence Platform Magnifi by TIFIN Customized Integrations Systematic Client Engagement Automation Platform Back Office Support Systems Orion Vision: Transforming Alternative Asset Data Management Through Technology Billing Enhancements Next-Generation Workflow Experience H. Adam Holt Matt Brown Laxmi Ramanath Margaret Hartigan Eric Clarke Shuang Chen Aaron Klein Evan Rapoport Robert Sofia Dr. Vinay Nair David Benskin Shannon Rosic Christina Walls Laurie Erbar Alex Smith-Ryland Shane Williams Arlene Pons Wes Stillman Client Onboarding Platform PreciseFP v6.0 Global Electronic KYC Gateway Digital Advisor-Client Portal Orion Launches New Client Portal Experience Client Portal Permutation Black Diamond Client View Comprehensive Wealth Experience Client Portal Decision Optimizer Control Room and Conflict Check Compliance TRACKR AI-Powered Video Compliance Solution Best Interest Followers Application Smashr Communications Intelligence Platform SmartRIA Pro® Platform Regulatory Surveillance Software State Law Compliance Database Salesforce Integrations Reducing Regulatory Risk with Automated Deliverables Scienc Services Salentica CRM Platform Flourish Crypto AI Driven Model Portfolios Cyber Security Compliance Cyber Security Compliance Fully Vested Brand Campaign Blend Out Campaign Vestmark 3 Pillars Campaign The Love Campaign DEI Program Spotlighting New Voices Inclusion and Diversity Strategy Secure Document Exchange and Digital Vault Solutions Marketplace Financial Wellness Mobile App New Tools and Features TIFIN Plan Client Outcomes Collaborate Planning Services Financial Wellness Score Digital 401(k) Transfer Tool Riskalyze's Build My Tech Stack Estate Administration Automation Platform S&B Investing Toolkit for Advisors ESG Business Owner Digital Experience Broadridge Wealth Platform Recruiting as a Service Flourish Crypto HomeCare Platform Integrare Digital Ecosystem as a Service (IDEaaS) Trading Platform for Pre-IPO Companies Securities-Based Lending Platform TIFIN Flow
Artificial Intelligence	Capital InvestIX Aidestified LLC CAIS FactSet Smashr TIFIN benjamin Bento Engine CogniCor Hubly Orion Panoramix Practifi Asset-Map CAIS La Meer Inc. Marstone Inc. Orion RightCapital Riskalyze SMARTX Advisory Solutions Snappy Kraken TIFIN Wealth Access Flyer Financial Technologies intelliflo Smashr SMARTX Advisory Solutions CAIS MyVest RightSize Solutions Andes Wealth Technologies PreciseFP ProgressSoft Corporation Mirador, LLC Orion Panoramix SS&C Black Diamond Wealth Platform Wealth Access Broadridge ComplySci Docupace Hearsay Systems InvestorCOM Inc. Smashr SmartRIA SS&C Black Diamond Wealth Platform Winnow Solutions, LLC AppCrown Practifi Scienc SS&C Salentica Flourish THOR Financial Technologies Entreda EverSafe Ervesnet, Inc. Snappy Kraken Vestmark White Glove	Global Distributed Ledger Solution Trading Platform for Pre-IPO Companies AI-Driven Referrals CAIS IQ Fund and ETF Screener Smashr Communications Intelligence Platform Magnifi by TIFIN Customized Integrations Systematic Client Engagement Automation Platform Back Office Support Systems Orion Vision: Transforming Alternative Asset Data Management Through Technology Billing Enhancements Next-Generation Workflow Experience H. Adam Holt Matt Brown Laxmi Ramanath Margaret Hartigan Eric Clarke Shuang Chen Aaron Klein Evan Rapoport Robert Sofia Dr. Vinay Nair David Benskin Shannon Rosic Christina Walls Laurie Erbar Alex Smith-Ryland Shane Williams Arlene Pons Wes Stillman Client Onboarding Platform PreciseFP v6.0 Global Electronic KYC Gateway Digital Advisor-Client Portal Orion Launches New Client Portal Experience Client Portal Permutation Black Diamond Client View Comprehensive Wealth Experience Client Portal Decision Optimizer Control Room and Conflict Check Compliance TRACKR AI-Powered Video Compliance Solution Best Interest Followers Application Smashr Communications Intelligence Platform SmartRIA Pro® Platform Regulatory Surveillance Software State Law Compliance Database Salesforce Integrations Reducing Regulatory Risk with Automated Deliverables Scienc Services Salentica CRM Platform Flourish Crypto AI Driven Model Portfolios Cyber Security Compliance Cyber Security Compliance Fully Vested Brand Campaign Blend Out Campaign Vestmark 3 Pillars Campaign The Love Campaign DEI Program Spotlighting New Voices Inclusion and Diversity Strategy Secure Document Exchange and Digital Vault Solutions Marketplace Financial Wellness Mobile App New Tools and Features TIFIN Plan Client Outcomes Collaborate Planning Services Financial Wellness Score Digital 401(k) Transfer Tool Riskalyze's Build My Tech Stack Estate Administration Automation Platform S&B Investing Toolkit for Advisors ESG Business Owner Digital Experience Broadridge Wealth Platform Recruiting as a Service Flourish Crypto HomeCare Platform Integrare Digital Ecosystem as a Service (IDEaaS) Trading Platform for Pre-IPO Companies Securities-Based Lending Platform TIFIN Flow
Business Support Systems Workflow Automation	Orion Panoramix Practifi Asset-Map CAIS La Meer Inc. Marstone Inc. Orion RightCapital Riskalyze SMARTX Advisory Solutions Snappy Kraken TIFIN Wealth Access Flyer Financial Technologies intelliflo Smashr SMARTX Advisory Solutions CAIS MyVest RightSize Solutions Andes Wealth Technologies PreciseFP ProgressSoft Corporation Mirador, LLC Orion Panoramix SS&C Black Diamond Wealth Platform Wealth Access Broadridge ComplySci Docupace Hearsay Systems InvestorCOM Inc. Smashr SmartRIA SS&C Black Diamond Wealth Platform Winnow Solutions, LLC AppCrown Practifi Scienc SS&C Salentica Flourish THOR Financial Technologies Entreda EverSafe Ervesnet, Inc. Snappy Kraken Vestmark White Glove	Orion Vision: Transforming Alternative Asset Data Management Through Technology Billing Enhancements Next-Generation Workflow Experience H. Adam Holt Matt Brown Laxmi Ramanath Margaret Hartigan Eric Clarke Shuang Chen Aaron Klein Evan Rapoport Robert Sofia Dr. Vinay Nair David Benskin Shannon Rosic Christina Walls Laurie Erbar Alex Smith-Ryland Shane Williams Arlene Pons Wes Stillman Client Onboarding Platform PreciseFP v6.0 Global Electronic KYC Gateway Digital Advisor-Client Portal Orion Launches New Client Portal Experience Client Portal Permutation Black Diamond Client View Comprehensive Wealth Experience Client Portal Decision Optimizer Control Room and Conflict Check Compliance TRACKR AI-Powered Video Compliance Solution Best Interest Followers Application Smashr Communications Intelligence Platform SmartRIA Pro® Platform Regulatory Surveillance Software State Law Compliance Database Salesforce Integrations Reducing Regulatory Risk with Automated Deliverables Scienc Services Salentica CRM Platform Flourish Crypto AI Driven Model Portfolios Cyber Security Compliance Cyber Security Compliance Fully Vested Brand Campaign Blend Out Campaign Vestmark 3 Pillars Campaign The Love Campaign DEI Program Spotlighting New Voices Inclusion and Diversity Strategy Secure Document Exchange and Digital Vault Solutions Marketplace Financial Wellness Mobile App New Tools and Features TIFIN Plan Client Outcomes Collaborate Planning Services Financial Wellness Score Digital 401(k) Transfer Tool Riskalyze's Build My Tech Stack Estate Administration Automation Platform S&B Investing Toolkit for Advisors ESG Business Owner Digital Experience Broadridge Wealth Platform Recruiting as a Service Flourish Crypto HomeCare Platform Integrare Digital Ecosystem as a Service (IDEaaS) Trading Platform for Pre-IPO Companies Securities-Based Lending Platform TIFIN Flow
Chief Executive Officer of the Year	Orion Panoramix Practifi Asset-Map CAIS La Meer Inc. Marstone Inc. Orion RightCapital Riskalyze SMARTX Advisory Solutions Snappy Kraken TIFIN Wealth Access Flyer Financial Technologies intelliflo Smashr SMARTX Advisory Solutions CAIS MyVest RightSize Solutions Andes Wealth Technologies PreciseFP ProgressSoft Corporation Mirador, LLC Orion Panoramix SS&C Black Diamond Wealth Platform Wealth Access Broadridge ComplySci Docupace Hearsay Systems InvestorCOM Inc. Smashr SmartRIA SS&C Black Diamond Wealth Platform Winnow Solutions, LLC AppCrown Practifi Scienc SS&C Salentica Flourish THOR Financial Technologies Entreda EverSafe Ervesnet, Inc. Snappy Kraken Vestmark White Glove	Orion Vision: Transforming Alternative Asset Data Management Through Technology Billing Enhancements Next-Generation Workflow Experience H. Adam Holt Matt Brown Laxmi Ramanath Margaret Hartigan Eric Clarke Shuang Chen Aaron Klein Evan Rapoport Robert Sofia Dr. Vinay Nair David Benskin Shannon Rosic Christina Walls Laurie Erbar Alex Smith-Ryland Shane Williams Arlene Pons Wes Stillman Client Onboarding Platform PreciseFP v6.0 Global Electronic KYC Gateway Digital Advisor-Client Portal Orion Launches New Client Portal Experience Client Portal Permutation Black Diamond Client View Comprehensive Wealth Experience Client Portal Decision Optimizer Control Room and Conflict Check Compliance TRACKR AI-Powered Video Compliance Solution Best Interest Followers Application Smashr Communications Intelligence Platform SmartRIA Pro® Platform Regulatory Surveillance Software State Law Compliance Database Salesforce Integrations Reducing Regulatory Risk with Automated Deliverables Scienc Services Salentica CRM Platform Flourish Crypto AI Driven Model Portfolios Cyber Security Compliance Cyber Security Compliance Fully Vested Brand Campaign Blend Out Campaign Vestmark 3 Pillars Campaign The Love Campaign DEI Program Spotlighting New Voices Inclusion and Diversity Strategy Secure Document Exchange and Digital Vault Solutions Marketplace Financial Wellness Mobile App New Tools and Features TIFIN Plan Client Outcomes Collaborate Planning Services Financial Wellness Score Digital 401(k) Transfer Tool Riskalyze's Build My Tech Stack Estate Administration Automation Platform S&B Investing Toolkit for Advisors ESG Business Owner Digital Experience Broadridge Wealth Platform Recruiting as a Service Flourish Crypto HomeCare Platform Integrare Digital Ecosystem as a Service (IDEaaS) Trading Platform for Pre-IPO Companies Securities-Based Lending Platform TIFIN Flow
Client Onboarding / New Account Opening	Andes Wealth Technologies PreciseFP ProgressSoft Corporation Mirador, LLC Orion Panoramix SS&C Black Diamond Wealth Platform Wealth Access Broadridge ComplySci Docupace Hearsay Systems InvestorCOM Inc. Smashr SmartRIA SS&C Black Diamond Wealth Platform Winnow Solutions, LLC AppCrown Practifi Scienc SS&C Salentica Flourish THOR Financial Technologies Entreda EverSafe Ervesnet, Inc. Snappy Kraken Vestmark White Glove	Client Onboarding Platform PreciseFP v6.0 Global Electronic KYC Gateway Digital Advisor-Client Portal Orion Launches New Client Portal Experience Client Portal Permutation Black Diamond Client View Comprehensive Wealth Experience Client Portal Decision Optimizer Control Room and Conflict Check Compliance TRACKR AI-Powered Video Compliance Solution Best Interest Followers Application Smashr Communications Intelligence Platform SmartRIA Pro® Platform Regulatory Surveillance Software State Law Compliance Database Salesforce Integrations Reducing Regulatory Risk with Automated Deliverables Scienc Services Salentica CRM Platform Flourish Crypto AI Driven Model Portfolios Cyber Security Compliance Cyber Security Compliance Fully Vested Brand Campaign Blend Out Campaign Vestmark 3 Pillars Campaign The Love Campaign DEI Program Spotlighting New Voices Inclusion and Diversity Strategy Secure Document Exchange and Digital Vault Solutions Marketplace Financial Wellness Mobile App New Tools and Features TIFIN Plan Client Outcomes Collaborate Planning Services Financial Wellness Score Digital 401(k) Transfer Tool Riskalyze's Build My Tech Stack Estate Administration Automation Platform S&B Investing Toolkit for Advisors ESG Business Owner Digital Experience Broadridge Wealth Platform Recruiting as a Service Flourish Crypto HomeCare Platform Integrare Digital Ecosystem as a Service (IDEaaS) Trading Platform for Pre-IPO Companies Securities-Based Lending Platform TIFIN Flow
Client Portals	Orion Panoramix SS&C Black Diamond Wealth Platform Wealth Access Broadridge ComplySci Docupace Hearsay Systems InvestorCOM Inc. Smashr SmartRIA SS&C Black Diamond Wealth Platform Winnow Solutions, LLC AppCrown Practifi Scienc SS&C Salentica Flourish THOR Financial Technologies Entreda EverSafe Ervesnet, Inc. Snappy Kraken Vestmark White Glove	Gateway Digital Advisor-Client Portal Orion Launches New Client Portal Experience Client Portal Permutation Black Diamond Client View Comprehensive Wealth Experience Client Portal Decision Optimizer Control Room and Conflict Check Compliance TRACKR AI-Powered Video Compliance Solution Best Interest Followers Application Smashr Communications Intelligence Platform SmartRIA Pro® Platform Regulatory Surveillance Software State Law Compliance Database Salesforce Integrations Reducing Regulatory Risk with Automated Deliverables Scienc Services Salentica CRM Platform Flourish Crypto AI Driven Model Portfolios Cyber Security Compliance Cyber Security Compliance Fully Vested Brand Campaign Blend Out Campaign Vestmark 3 Pillars Campaign The Love Campaign DEI Program Spotlighting New Voices Inclusion and Diversity Strategy Secure Document Exchange and Digital Vault Solutions Marketplace Financial Wellness Mobile App New Tools and Features TIFIN Plan Client Outcomes Collaborate Planning Services Financial Wellness Score Digital 401(k) Transfer Tool Riskalyze's Build My Tech Stack Estate Administration Automation Platform S&B Investing Toolkit for Advisors ESG Business Owner Digital Experience Broadridge Wealth Platform Recruiting as a Service Flourish Crypto HomeCare Platform Integrare Digital Ecosystem as a Service (IDEaaS) Trading Platform for Pre-IPO Companies Securities-Based Lending Platform TIFIN Flow
Compliance	Orion Panoramix SS&C Black Diamond Wealth Platform Wealth Access Broadridge ComplySci Docupace Hearsay Systems InvestorCOM Inc. Smashr SmartRIA SS&C Black Diamond Wealth Platform Winnow Solutions, LLC AppCrown Practifi Scienc SS&C Salentica Flourish THOR Financial Technologies Entreda EverSafe Ervesnet, Inc. Snappy Kraken Vestmark White Glove	Gateway Digital Advisor-Client Portal Orion Launches New Client Portal Experience Client Portal Permutation Black Diamond Client View Comprehensive Wealth Experience Client Portal Decision Optimizer Control Room and Conflict Check Compliance TRACKR AI-Powered Video Compliance Solution Best Interest Followers Application Smashr Communications Intelligence Platform SmartRIA Pro® Platform Regulatory Surveillance Software State Law Compliance Database Salesforce Integrations Reducing Regulatory Risk with Automated Deliverables Scienc Services Salentica CRM Platform Flourish Crypto AI Driven Model Portfolios Cyber Security Compliance Cyber Security Compliance Fully Vested Brand Campaign Blend Out Campaign V