WM Industry Awards

WealthManagement.com 2022 Industry Awards Finalists/Honorees

AWARD CATEGORY	COMPANY	INITIATIVE OR INDIVIDUAL
ASSET MANAGERS		
Alternatives	AXS Investments	Inflation Sensitive ETF
	Hamilton Lane	Private Markets 101
	Nationwide	Risk-Managed Income ETF Suite
	Simplify	Democratizing Access to Better Portfolios
	SteelPeak Wealth	SteelPeak Capital Opportunity Funds
	StepStone Conversus LLC	StepStone Conversus
Charitable Giving/Donor Advised Funds	Bank of America	Maximizing Clients Giving
	Fiduciary Trust Company	Donor Advised Funds
	Schwab Charitable	The Schwab Charitable Giving Guide
Chief Executive Officer of the Year	Defiance ETFs	Sylvia Jablonski
	Diamond Hill	Heather Brilliant
	Ethic	Doug Scott
	First Ascent Asset Management	Scott MacKillop
	FS Investments	Michael Forman
	Humankind Investments	James Katz
	Innovator ETFs	Bruce Bond
	Simplify	Paul Kim
	SpiderRock Advisors	Eric Metz
	Voya Investment Management	Christine Hurtsellers
Chief Marketing Officer of the Year	Allspring Global Investments	Kelly Vives
	First Ascent Asset Management	Ben Sullivan
	Russell Investments	Mollie Jensen
Corporate Social Responsibility	FS Investments	Philadelphia Financial Scholars
	John Hancock Investment Management	MLK Scholars Program
Digital Marketing Campaign of the Year	Cohen & Steers	Real Assets Digital Marketing Campaign
	Macquarie Asset Management	The Sharpe Advisor Private Markets Guide
	Natixis Investment Managers	Sustainable Future Digital Marketing Campaign
	Principal Global Investors	Speaker Series and Digital Marketing Campaign
Diversity, Equity and Inclusion	Arnerich Massena	Diversity, Equity and Inclusion Campaign
	Fiduciary Trust International	DEI Shareholder Engagement
	Hamilton Lane	Emerging Talent Internship Program
	Morgan Stanley	The Equity Collective
	Nationwide Financial	Nationwide Retirement Institute Diverse Markets Initiative
ETFs	AXS Investments	Inflation Sensitive ETF
	Humankind Investments	Humankind US Stock ETF
	Innovator ETFs	Defined Outcome ETF
	Janus Henderson Investors	Sustainable Solutions ETFs Launch
	KraneShares	Climate/ESG ETF
	Simplify	Democratizing Access to Better Portfolios
	TrueShares ETFs	Structured Outcome ETFs
	VanEck	Digital Asset Fund Expansion
	WisdomTree	Expanded ETF Offerings
Fixed Income	IndexIQ	ESG Bond ETF
	Nuveen	Global Fixed Income Impact Report
New Product Development	AXS Investments	Inflation Sensitive ETF
	Defiance ETFs	NFTZ, NFT ETF
	FS Investments	Chiron Real Asset Fund
	Hamilton Lane	Private Assets Fund (PAF)
	Masterworks	Diversified Art Portfolio
	Morningstar Investment Services LLC	U.S. Sustainability Moat Focus Portfolios (SMA)
	New York Life Investments / IndexIQ	Dual Impact ETF Suite Expansion
	VanEck	Digital Asset Fund Expansion
Real Estate (including REITs)	Cadre	Direct Access Fund
	Cohen & Steers	REIT Academy
	Noyack Capital	REIT Investment Using Cryptocurrency
Separate Accounts	Eaglebrook Advisors	Crypto SMA Platform
	Kingsly Capital Management, LLC	Sub-Advisory for RIA's
	Russell Investments	Russell Personalized Managed Accounts (PMA)
Socially Responsible Investing (SRI) / Impact Investing	Envestnet | PMC	ESG Due Diligence Framework
	First Ascent Asset Management	Flat Fee ESG Initiative
	FlexShares	ESG and Climate Suite
	Humankind Investments	Humankind US Stock ETF
	Morgan Stanley Wealth Management | Investment Solutions	Impact Signal
	New York Life Investments / IndexIQ	Dual Impact ETF Suite Expansion
Thought Leadership Advisor Education	Cohen & Steers	Real Assets Thought Leadership Campaign
	Fiduciary Trust Company	Advisor-Client Engagement Insights
	Guggenheim Investments	Behavioral Finance Initiative
	Hartford Funds	Human-centric Investing Podcast
	Macquarie Asset Management	Think Again Podcast
	Masterworks	Art as an Asset Class
	Morningstar Investment Services LLC	Investment Management Symposium
	Nationwide	Legacy Essentials
	Nuveen	RealAccess: Global Insights for Real Estate Investors
	Principal Global Investors	Speaker Series
Thought Leadership Product Enhancement	Elm Wealth	Investor Calculators
	VanEck	Digital Asset Fund Expansion
BROKER-DEALERS (All)		
Chief Marketing Officer of the Year	Cambridge Investment Research, Inc.	Jeffrey Vivacqua
	Cetera Financial Group	Michael Zuna
	Oppenheimer & Co. Inc.	Joan Khoury
Chief Technology Officer of the Year	Atria Wealth Solutions	John Reinhardt
	Bernstein Private Wealth Management	Tuppy Russo
Corporate Social Responsibility	Cambridge Investment Research, Inc.	Cambridge Community of Women
	Sigma Financial Corporation	Scaling Ukraine Relief Charitable Donations Campaign
Digital Marketing Campaign of the Year	Atria Wealth Solutions	PiggyBack Power
	Janney Montgomery Scott	Investor Events
	Voya Financial	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.	Amy Webber
	Cetera Financial Group	Adam Antoniades
Diversity, Equity and Inclusion	Commonwealth Financial Network	DEI Program
	J.P. Morgan Wealth Management	Advisor Development Program
	Lincoln Financial Network	Inclusion and Diversity Initiatives
	LPL Financial	Black Advisor Voices Video Series
	Merrill Wealth Management	Diverse Viewpoints
Practice Management	Advisor Group Inc.	Business Valuation and Analytics Assessment
	LPL Financial	M&A Solutions
	Raymond James	Practice Exchange
Service	Atria Wealth Solutions	Premuim Service
	Commonwealth Financial Network	Virtual Administration Program
	LPL Financial	Paraplanning Services
	Raymond James	Remote Admin Extension
Technology	Atria Wealth Solutions	Unio Advisor Platform
	LPL Financial	Clientworks Meeting Manager
Thought Leadership	Bank of America	Philanthropy Study
	Cambridge Investment Research, Inc.	Cambridge Stronger Podcast
	Cetera Financial Group	Fed Monitor Dashboard and Fed-o-meter
	Voya Financial	Voya's Hire thru Retire: A Health and Wealth Podcast
Transition Support	Cetera Financial Group	Accesslink
	Commonwealth Financial Network	Virtual Transition Support (VTS)
BROKER–DEALERS (Fewer Than 1,000 Advisors)		
Chief Executive Officer of the Year	Prospera Financial Services	Tim Edwards and David Stringer
	Sigma Financial Corporation	Jerry Rydell
Diversity, Equity and Inclusion	Bernstein Private Wealth Management	A|3 Collective
	Janney Montgomery Scott	IMPACT Conference
Practice Management	Bernstein Private Wealth Management	Automated Client Review Book Service
	Janney Montgomery Scott	Financial Planning Masterclass Series
	PEAK Reps, LLC	Online Marketing Program
	Prospera Financial Services	Protect Engagement Score
Technology	American Portfolios Financial Services, Inc.	Platform Upgrades
	Bernstein Private Wealth Management	Mobile App
	Copper Financial	Wealth Management 360 Portal
	Janney Montgomery Scott	Prospect Site
Thought Leadership	American Portfolios Financial Services, Inc.	Market Commentary
	Bernstein Private Wealth Management	Tax Management Campaign
COMPLIANCE/LAW FIRMS		
	ComplySci	Employeee Compliance Platform
	MarketCounsel Consulting	Mark by MarketCounsel
	Winnow Solutions, LLC	State Law Compliance Database
CUSTODIANS		
Alternative Asset	Equity Advisor Solutions	Cryptocurrency Trading
	OpenAlt	Private Market Custodian
Diversity, Equity and Inclusion	BNY Mellon's Pershing	Minority Business Enterprise Client Council
	Schwab Advisor Services	DEI Program for RIAs
Practice Management	BNY Mellon | Pershing	M&A Strategy Program
	LPL Financial	Business Strategy Services
	Schwab Advisor Services	RIA Firm Design Blueprint Consultation for Advisors in Transition
Technology	BNY Mellon | Pershing	NetX360 Intelligent Search
	Fidelity Investments	Enhanced Technology Offerings
	Schwab Advisor Services	Schwab's Digital Onboarding
Thought Leadership	Fiduciary Trust Company	Advisor Community Conversations
	Schwab Advisor Services	BCE Webcast Series
DISRUPTORS		
Industry	Cadre	Direct Access Fund
	Choir	Spotlighting New Voices
	Facet Wealth	Financial Planning for People the Industry Ignores
	Finance of America Reverse, LLC	CE and Educational Components
	GMO	Nebo
	Indyfin	Investor Experience Platform
	Masterworks	Ecosystem of Art-based Product Solutions
	Orion	Disrupting Data Delivery
	The American College of Financial Services	C-Suite Diversity Leadership Program
	YourStake	ESG Investing Toolkit for Advisors
Technology	Eaglebrook Advisors	Crypto SMA Platform
	iJoin	iJoin MAP
	IncomeConductor (WealthConductor LLC)	Health +
	Summit Wealth Systems	Summit's WealthOS
	Supernova Technology™	Securities-Based Lending Platform
	Trustate	Estate Administration Automation Platform
	Wealth Access	Commercial Banking Digital Experience
FAMILY OFFICES		
Client Initiative	Geller Advisors LLC	myGellerCFO
	Pathstone	Pathstone ARROW
Thought Leadership	Arnerich Massena	Diversity, Equity and Inclusion Campaign
	Key Family Wealth	Succession Planning Strategy
	Pathstone	Thought Leadership Campaign
INDIVIDUAL RIA FIRM LEADERS		
Chief Executive Officer of the Year	Allworth Financial	Scott Hanson
	Beacon Pointe Advisors	Shannon Eusey
	Edelman Financial Engines	Larry Raffone
	Hightower Advisors	Bob Oros
	Mercer Advisors	Dave Welling
	Merit Financial Advisors	Rick Kent
	Sanctuary Wealth	Jim Dickson
	SignatureFD	Heather Fortner
	Wealth Enhancement Group	Jeff Dekko
	Wipfli Financial Advisors	Jeff Pierce
Chief Marketing Officer of the Year	Aspiriant	Cammie Doder
	Beacon Pointe Advisors	Allison Hillgren Warner
	Carson Group	Mary Kate Gulick
	Hightower Advisors	Meghan McCartan
	SignatureFD	Crystal Mathis
Chief Technology Officer of the Year	Arnerich Massena	David Vaughan
	HCR Wealth Advisors	Alyssa Phillips
	SignatureFD	Walter Chamblee
Innovator of the Year	Adhesion Wealth	Barrett Ayers, President
	Intrepid Wealth Partners	Derek Notman, Founder and CEO
	Journey Strategic Wealth	Penny Phillips, President and Co-Founder
	Manhattan West	Lorenzo Esparza, CEO
	OneDigital Investment Advisors	Vince Morris, President
M&A Leader of the Year	Allworth Financial	Pat McClain, Co-Founder and Co-CEO
	Beacon Pointe Advisors	Matthew Cooper, President
	Merit Financial Advisors	Kay Lynn Mayhue, President
	OneDigital Investment Advisors	Vince Morris, President
	SageView Advisory Group	Randall Long, Founder and CEO
	Stratos Wealth Holdings	Lou Camacho, COO of Stratos Wealth Holdings and President of Stratos Wealth Enterprises
	The Colony Group	Zinovy Iosovich, President and Chief Services Officer
	Wealth Enhancement Group	Jeff Dekko, CEO
	Wealthspire Advisors	Michael LaMena, CEO
Rising Star of the Year Honorees	Beacon Pointe Advisors	Kevin DiSano, Chief Growth Officer
	Carson Group	Ana Trujillo Limón, Director of Coaching & Advisor Content
	Carson Group	Nick Engelbart, Chief Financial Officer
	Falcon Wealth Planning, Inc.	Gabriel Shahin, Principal and Founder
	HCR Wealth Advisors	Michelle Katzen, Managing Director
	Intrepid Wealth Partners	Derek Notman, Founder and CEO
	Mercer Advisors	Kara Duckworth, Managing Director of Client Experience
	Optas Capital	Ryan Klippel, Head of Social Impact / Financial Planner
	Robertson Stephens	Mallon FitzPatrick, Managing Director, Principal
	Waddell & Associates	Teresa J.W. Bailey, Director of Development and Senior Wealth Strategist
	Wedmont Private Capital	James Pelletier, Co-founder
	Wipfli Financial Advisors	Rafia Hasan, Chief Investment Officer
Thought Leader of the Year	Carson Group	Ron Carson, CEO and Founder
	Intrepid Wealth Partners	Derek Notman, Founder and CEO
	Keel Point	Steven L. Skancke, Ph.D. Chief Economic Advisor
	Mattreiner.com	Matt Reiner, Owner and Creator
	Mercer Advisors	Donald Calcagni, Chief Investment Officer
	Sunpointe Investments	Michael Pompian, Founder and CIO
	SVB Private	Shannon Saccocia, Chief Investment Officer
	Thrivent Advisor Network	Carolyn Armitage, Head of Thrivent Advisor Network
INDUSTRY ASSOCIATIONS		
	Alliance for Lifetime Income	Education Campaign
	National Association of Personal Financial Advisors (NAPFA)	DEI Training and Certificate Program
INDUSTRY RESEARCH PROVIDERS		
	Alliance for Lifetime Income	Retirement Income Research
	DeVoe & Company	RIA Talent Management Study
	New Constructs, LLC	Robo-Analyst Credit Ratings
	The American College of Financial Services	Black Women, Trust, and the Financial Services Industry
INSURANCE		
Service	Allianz Life Insurance Company of North America	The Conversations That Matter Project
	Fiduciary Insurance Services, Llc.	DC Retirement Income Consortium
	Nassau Financial Group	Amplifying Diverse Voices in Retirement Planning
Technology	Crump Life Insurance Services	Digital Transaction Center
	CUNA Mutual Group	Elevate
	Envestnet, Inc.	Insurance Exchange
	iPipeline	iSolve
	Jackson National Life Insurance Co.	Retirement Expense and Income Calculator
INVESTMENT BANKS/LENDERS/SUCCESSION PLANNING CONSULTANTS		
	PPC LOAN	Nextgen Financing and Education
	Wise Rhino Group	Enterprise Value Consulting and M&A Advisory
MARKETING | PR FIRMS		
Digital Campaign of the Year	Content 151	#ETFintwit #Top50
	FiComm partners	Podcast Awards
	Idea Decanter & Kalli Collective	Retirement Depression Video Campaign
	Impact Communications, Inc.	NAPFA Playbook
	Intention.ly	Income Investing Through Social Media Campaign
	Three Crowns Copywriting and Marketing	Wealth Access Customer Data Platform Campaign
NON-CUSTODIAL RIA SUPPORT PLATFORMS		
	Carson Group	DE&I Initiative
	Carson Group	Excell 2021
	Dynasty Financial Partners	CEO Program
	RFG Advisory	RFG Assist
RETIREMENT PLAN SUPPORT AND ADVISOR SERVICES		
401(k) Service	Empower	Empowering America's Financial Journey (EAFJ)
	Morningstar Investment Management LLC	Advisor Managed Accounts
	Morningstar Investment Management LLC	Personal Target-Date Funds
401(k)Technology	intellicents inc.	Worksite Financial Wellness Program
	Manifest	Digital 401(k) Transfer Tool
	PCS Retirement, LLC	The Advisor Lab 401(k) Toolkit®
	Pontera	Held Away Account Management
	Vestwell	Vestwell Managed Accounts
	Voya Financial	Voya's myHealth&Wealth Personalized Benefits Guidance
Aggregators: CEO of the Year	HUB Retirement and Private Wealth	Joseph DeNoyior
	OneDigital Investment Advisors	Vince Morris
DCIO Providers: Advisor Value Added Programs	Franklin Templeton Investments	Voice of the American Worker Program
	Natixis Investments	Center for Investor Insight
	Natixis Investments	Sustainable Future Funds Marketing Program
Record Keepers: Retirement Plan Advisor Support	Empower	Advisor Managed Account Platform
	Income America	Income America Platform
	John Hancock Retirement	Retirement Plan Advisor Support
SUCCESSION/OWNERSHIP TRANSITION SERVICES – NON-CUSTODIAN/BROKER-DEALER		
	Carson Group	Succession Plan
	DeVoe & Company	GrowthBuilder
TAMPs		
Model Marketplaces	Amplify Technology, LLC	Enhanced UMA Trading Interface
	SMArtX Advisory Solutions	Diversified Model Marketplace with OCIO Overlay
	The Pacific Financial Group	Strategy PLUS SDBA Model Portfolio Program
	THOR Financial Technologies	THOR's Model Marketplace
	UX Wealth Partners	AI Driven Platform
TAMPs	AssetMark	Digital Marketing
	Eaglebrook Advisors	Crypto SMA Platform
	Matson Money	Matson Money TAMP
	Smartleaf Asset Management, LLC	A Menu of TAMPs
	SMArtX Advisory Solutions	New Operational Efficiency Applications
	Tactive	Tactical Robo Advisory TAMP
TECHNOLOGY PROVIDERS		
Alternative Investment Platforms	iCapital	Global Distributed Ledger Solution
	InvestX	Trading Platform for Pre-IPO Companies
Artificial Intelligence	Aidentified LLC	AI-Driven Referrals
	CAIS	CAIS IQ
	FactSet	Fund and ETF Screener
	Smarsh	Smarsh Communications Intelligence Platform
	TIFIN	Magnifi by TIFIN
Business Support Systems | Workflow Automation	benjamin	Custodial Integrations
	Bento Engine	Systematic Client Engagement
	CogniCor	Automation Platform
	Hubly	Back Office Support Systems
	Orion	Orion Vision: Transforming Alternative Asset Data Management Through Technology
	Panoramix	Billing Enhancements
	Practifi	Next-Generation Workflow Experience
Chief Executive Officer of the Year	Asset-Map	H. Adam Holt
	CAIS	Matt Brown
	La Meer Inc.	Laxmi Ramanath
	Marstone Inc.	Margaret Hartigan
	Orion	Eric Clarke
	RightCapital	Shuang Chen
	Riskalyze	Aaron Klein
	SMArtX Advisory Solutions	Evan Rapoport
	Snappy Kraken	Robert Sofia
	TIFIN	Dr. Vinay Nair
	Wealth Access	David Benskin
Chief Marketing Officer of the Year	Flyer Financial Technologies	Shannon Rosic
	intelliflo	Christina Walls
	Smarsh	Laurie Ehrbar
	SMArtX Advisory Solutions	Alex Smith-Ryland
Chief Technology Officer of the Year	CAIS	Shane Williams
	MyVest	Arlene Pons
	RightSize Solutions	Wes Stillman
Client Onboarding / New Account Opening	Andes Wealth Technologies	Client Onboarding Platform
	PreciseFP	PreciseFP v6.0
	ProgressSoft Corporation	Global Electronic KYC
Client Portals	Mirador, LLC	Gateway Digital Advisor-Client Portal
	Orion	Orion Launches New Client Portal Experience
	Panoramix	Client Portal Permutation
	SS&C Black Diamond Wealth Platform	Black Diamond Client View
	Wealth Access	Comprehensive Wealth Experience Client Portal
Compliance	Broadridge	Decision Optimizer
	ComplySci	Control Room and Conflict Check
	Docupace	Compliance TRACKR
	Hearsay Systems	AI-Powered Video Compliance Solution
	InvestorCOM Inc.	Best Interest Rollovers Application
	Smarsh	Smarsh Communications Intelligence Platform
	SmartRIA	SmartRIA Pro® Platform
	SS&C Black Diamond Wealth Platform	Regulation Surveillance Software
	Winnow Solutions, LLC	State Law Compliance Database
CRM	AppCrown	Salesforce Integrations
	Practifi	Reducing Regulatory Risk with Automated Deliverables
	Skience	Skience Services
	SS&C Salentica	Salentica CRM Platform
Cryptocurrency	Flourish	Flourish Crypto
	THOR Financial Technologies	AI Driven Model Portfolios
Cyber Security	Entreda	Cyber Secutiry Compliance
	EverSafe	Financial Health Tool For Seniors and Caregivers
Digital Marketing Campaign of the Year	Envestnet, Inc.	Fully Vested Brand Campaign
	Snappy Kraken	Blend Out Campaign
	Vestmark	Vestmark 3 Pillars Campaign
	White Glove	The Love Campaign
Diversity, Equity and Inclusion	CAIS	DEI Program
	Choir	Spotlighting New Voices
	MyVest	Inclusion and Diversity Strategy
Document Management	FutureVault	Secure Document Exchange and Digital Vault
	Laserfiche	Solutions Marketplace
Financial Planning	eMoney Advisor	Financial Wellness Mobile App
	Envestnet | MoneyGuide	New Tools and Features
	TIFIN	TIFIN Plan
Innovation New Applications	Bento Engine	Client Outcomes
	eMoney Advisor	Collaborate Planning Services
	FP Alpha	Financial Wellness Score
	Manifest	Digital 401(k) Transfer Tool
	Riskalyze	Riskalyze's Build My Tech Stack
	Trustate	Estate Administration Automation Platform
	Wealth Access	SMB Business Owner Digital Experience
	YourStake	ESG Investing Toolkit for Advisors
Innovation Platforms	Broadridge	Broadridge Wealth Platform
	FA Match	Recruiting as a Service
	Flourish	Flourish Crypto
	Healthpilot	Medicare Platform
	Invent.us	Integrated Digital Ecosystem as a Service (iDEaaS)
	InvestX	Trading Platform for Pre-IPO Companies
	Supernova Technology™	Securities-Based Lending Platform
	TIFIN	TIFIN Grow
Marketing Automation	AdvisorEngine	Lead Concierge
	FMG Suite	Mobile App for Advisor Marketing
	TIFIN	Clout by TIFIN
	White Glove	Conversion Campaigns
Model Marketplaces	Adhesion Wealth	Manager Exchange
	Charles River Development	Wealth Hub
	Vestmark	Vestmark Manager Marketplace
Portfolio Analytics	Andes Wealth Technologies	Deep Analytic Visualizations
	FactSet	Advisor Dashboard
	Fidelity Investments	Digital Portfolio Construction Tool
	NetworkFinancials Inc.	TROVA Data Analytics
	Riskalyze	Riskalyze's New Portfolio Analytics and Research Capabilities
	TOGGLE AI	AI-Based Scenario Analysis and Testing Tool
	Zephyr	Back to the Future of Analytics
Portfolio Data Screening	Broadridge	ESG for Fiduciaries
	Option Research & Technology Services	Web Based Options Dashboard
	TIFIN	Magnifi by TIFIN
Portfolio Management, Accounting and Performance Reporting	AltExchange	Aggregation Platform
	aixigo AG	BLOXX Platform
	SS&C Black Diamond Wealth Platform	Data-Mining Capabilities
	Panoramix	Panoramix Pro
	Advyzon	Platform Enhancements
	Zephyr	A Star is Born Named Zephyr
Real Estate	Advisor Credit Exchange	Advisor Credit Exchange Platform
	AppFolio Investment Management	Real Estate Solution
	Cadre	Direct Access Fund
	Willowfinch	Home Search App
Rebalancing	Advyzon	Quantum® Rebalancer
	IMTC	Fixed Income Rebalancer
	RedBlack, an intelliflo solution	Cloud-based Multi-custodian Rebalancing and Trading Solution
	Riskalyze	Riskalyze's Intelligent Tax Optimization
	Vestmark	Vestmark Rebalancing Engine
Risk Tolerance / Client Profiling	Andes Wealth Technologies	Personalized Risk Tolerance Assessment
	Morningstar, Inc.	Morningstar Risk Ecosystem
	Orion	Orion's 3D Risk Tolerance Questionnaire
	Riskalyze	Riskalyze's Next-Generation Risk Questionnaire
	TIFIN	TIFIN Risk
Social Media Leadership	FMG Suite	Wealth Transfer Marketing Strategies
	Snappy Kraken	Bull and Bear Markets Quiz Visual Insights Newsletter
	White Glove	The Love Campaign
Specialized Planning Applications	Asset-Map	Signals
	IncomeConductor (WealthConductor LLC)	Health +
	Orion	Protect, Live, Dream
Thought Leadership	Asset-Map	AdviceTech Live
	eMoney Advisor	Planning with Purpose
	Envestnet, Inc.	The Big Reveal Podcast Series
	FMG Suite	SEC Marketing Rule Campaign
	Orion	Standard Deviations Podcast
	Panoramix	Fun with [Fill in the Blank]
	Riskalyze	Riskalyze's Fearless Investing Summit
	Snappy Kraken	Blend Out Campaign
	Willow	Client Retention and Growth Platform for Women and Underrepresented Investors
Unified (All-In-One) Systems	Advisor360°	Digital Onboarding
	Advyzon	Platform Enhancements
	MyVest	Advisor Sleeves Enhancement
	Orion	Advisor-Client Journey
	SS&C Technologies, Inc	SS&C Trust Suite
TRUSTS		
	Bank of America Private Bank	Wealth Impact Planning
	Bridgeford Trust Company	International Trust and Insurance Solutions
	Fiduciary Trust Company	ESG and Sustainability in Trusts

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