2025 Wealth Management.com Industry Awards

WealthManagement.com 2025 Industry Awards Finalists and Honorees by Category

Award Category	Company Name	Nomination Name
ADVISOR SUPPORT PLATFORMS		
	Advisory Services Network	Small Advisor Support
	Affiliated Advisors	Synthesis: NextGen Affiliation Program
	NewEdge Capital Group	Bridge Program
	Sanctuary Wealth	Wealth Management Platform
	XY Planning Network	Sapphire
ASSET MANAGERS		
Alternative Investments	Ares Wealth Management Solutions	Private Markets
	Calamos Investments	Risk Management
	CaskX	Whiskey Investment Platform
	Fidelity Investments	Alternative Investments
	HPA Exchange	Healthcare-Focused 1031 Exchange
	Meketa Capital	Private Infrastructure Investments
	OneAscent Capital	Private Markets
	SEI	SEI Access
	StepStone Private Wealth	Global Private Credit
	TheCarCrowd	Classic Car Investment Platform
Chief Executive Officer of the Year	F/m Investments	Alex Morris
	StepStone Private Wealth	Bob Long
	TCW	Katie Koch
	WisdomTree	Jonathan Steinberg
Chief Marketing Officer of the Year	Allspring Global Investments	Kelly Vives
	Global X ETFs	Christopher Adams
	Meeder Investment Management	Leah Curtis
	NEOS Investments	Zachary Csillag
	Research Affiliates	Natalie Grasso
	WisdomTree	Luba Spear
Client Experience Initiative	Allspring Global Investments	Remi Advisor Portal
	Bank of America Private Bank	Unified Mobile App
	Franklin Templeton	Personalized Resource Dashboard
	PIMCO	Advisor Forum

Digital Marketing Campaign of the Year	Meeder Investment Management	National Accounts Campaign
	Nuveen	Benefits 2.0
	Research Affiliates	NIXT Campaign
ETFs	BondBloxx	Private Credit ETF
	Calamos Investments	Structured Protection ETFs
	Capital Group	Active Fixed Income ETF Education
	NEOS Investments	Tax Efficient Income ETFs
	Simplify	Access to Alternatives
	Touchstone Investments	Touchstone Dynamic International ETF
	TrueShares	Laddered Buffer ETF
Fixed Income	BondBloxx	Private Credit ETF
	Fidelis Capital Partners	Fixed Income SMA Strategy
	TCW	Active Fixed Income ETFs
Goals-based Investment Platforms	Modelist	Goals-Based Model Portfolios
	Nebo Wealth	Enterprise Solutions Platform
	SS&C Black Diamond	Proposal Generation Tool
New Product Development	CAZ Investments	Alternative Investments Registered Fund
	Eaton Vance's U.S. Charitable Gift Trust	Charitable Gift Trust
	Fidelity Investments	Digital Assets Portfolios
	Harris | Oakmark	Large Cap ETF
	NEOS Investments	Tax Efficient Income ETFs
	Smartleaf Asset Management	Automated Unified Managed Households
	StepStone Private Wealth	Global Private Credit Access
	VistaShares	Actively Managed ETFs
Portfolio Construction	BlackRock	Public Private Portfolios
	Kestra Investment Management	Portfolio Solutions
	Modelist	Custom Model Construction
	Nebo Wealth	Goals-Driven Model Selector Program
Thought Leadership	CAZ Investments	Alternative Investments Education
	Dunham & Associates Investment Counsel	Retirement Planning White Paper
	Jackson	Is 100 the New 70?
	Meeder Investment Management	The Conundrum: Investment Education
	Morningstar Wealth	The Market Minute
	Nebo Wealth	Challenging the Overreliance on Risk Scores

	New York Life Investments	Megatrends 2024
	Principal Asset Management	Global Market Perspectives
	Research Affiliates	Research Affiliates' Deletions Index
	VanEck	Digital Assets Research
BROKER-DEALERS		
Chief Executive Officer of the Year	1847Financial	Heather Nagengast
	Concorde Investment Services	Danielle Delongchamp
	Purshe Kaplan Sterling Investments	Katherine Flouton
	Silver Oak Securities	Billy Hopkins
	United Planners Financial Services	Michael A. Baker
Digital Marketing Campaign of the Year	Axtella	Target City Campaign
	Bernstein Private Wealth Management	Dessert Explainer Series
	Cetera	Omni Channel Campaign
	United Planners Financial Services	Yes, It's True Campaign
Service	Axtella	Tech Talks Webinar Series
	Bernstein Private Wealth Management	Ultra-High Net Worth Platform
	Cambridge Investment Research	Private Client Services
Thought Leadership	Merrill Wealth Management	Women's Wealth & Wisdom Symposium
	Osaic	Financial Planning Campaign
	UBS	Road to Election Video Series
	Wells Fargo	Pillars of Understanding
Transition Support	Cetera Financial Group	Onboarding Navigator
	Janney Montgomery Scott	Client Onboarding Tool
	Purshe Kaplan Sterling Investments	Transition Services
	Signature Estate & Investment Advisors	Signature Estate Securities (SES)
BROKER-DEALERS (1,000 Advisors or More)		
Practice Management	Avantax Wealth Management	Peer Mentorship Program
	Merrill Wealth Management	Level Up Your Practice Training Program
	Osaic	Wealth Advisor Academy
Technology	LPL Financial	AI and the Client/Advisor Experience
	Morgan Stanley	Generative AI Platform
	RBC Wealth Management	Meeting Preparation Tool
BROKER–DEALERS (Fewer Than 1,000 Advisors)		
Practice Management	Janney Montgomery Scott	Practice Management Support

	Prospera Financial Services	Planning Your Way
Technology	Concorde Investment Services	Elevated Experience Technology
	Janney Montgomery Scott	Portfolio Construction Tool
	United Planners Financial Services	AI-Powered Workflow Automation
CHIEF TECHNOLOGY OFFICER OF THE YEAR		
	LPL Financial	Greg Gates
	RBC Clearing & Custody	Noel Stave
COMPLIANCE/LAW FIRMS		
	COMPLY	COMPLY Program
	Key Bridge Compliance	Compliance Support
	Pension Resource Institute	RolloverAdvantage
CORPORATE SOCIAL RESPONSIBILITY		
	Brighton Jones	B Corp Designation
	Cambridge Investment Research	Next Step® Internship
	FinServ Foundation	Young Advisor Development Program
	FSC Wealth Advisors	HER Wealth Program
	Net Positive Consortium	Net Positive Consortium
	Osaic	LIFE Financial Literacy Pathways
	Osaic	Osaic Foundation
	Panoramix	Carbon Neutral Program
	Raymond James	Ready for School Program
	The Haverford Trust Company	Internship Program
	Thornburg Investment Management	Power of Partnership
CUSTODIANS		
Alternative Asset	Apex Fintech Solutions	Apex Alts
	Goldman Sachs Advisor Solutions	Access to Alternative Investments
Practice Management	BNY Pershing	Next Leaders Cohort Program
	Fidelity Investments	Organic Growth Strategy
	SEI	Business Audit
Technology	Altruist	Technology Integration
	Interactive Brokers	AI Commentary Generator
	TradePMR	Fusion SYNC
Transition Support	Fiduciary Trust Company	Custody Transitions
	Goldman Sachs Advisor Solutions	Digital Onboarding
	TradePMR	Fusion SYNC
DISRUPTORS		

Industry	bQuest	Aging Care Coordination Platform
	CoinDesk Indices	CoinDesk 20
	Digital Assets Council of Financial Professionals	Blockchain and Digital Assets Certification
	The American College of Financial Services	Horizons 2025
	TradePMR	Robinhood and TradePMR
Technology	11thEstate | 11th.com	Fund Recovery
	Alaris Acquisitions	M&A Matchmaking
	ARQA	AI-Powered Workflow
	AssetLink	Relationship Intelligence
	Fynancial	Branded Client Portal
	InvestCloud	Private Markets Account
	Praxis Solutions	AI-Driven Due Diligence and Analytics
	RIA Growth Catalyst	AI-Powered Insights
	Zeplyn	Agentic AI Assistant
	Zocks	Client Intelligence
DIVERSITY, EQUITY AND INCLUSION		
	Cambridge Investment Research	Community of Women Program
	Holistiplan	Initiatives in Academia
	Northwestern Mutual	D&I Development Summit
	Zenith Wealth Partners	Internship Program
ESTATE PLANNING		
Advisor Service and Support	Eaton Vance's U.S. Charitable Gift Trust	Estate Planning Tool
	Fiduciary Trust Company	Estate Planning Education
	Vanilla	Document Abstraction Services
	Wealth.com	Attorney Partner Network
Implementation	Eaton Vance's U.S. Charitable Gift Trust	Estate Planning Tool
	EncorEstate Plans	Standalone Deed Service
	Vanilla	Vanilla Academy
	Wealth.com	Family Office Suite
Technology	Bryn Mawr Trust	Tax and Retirement Planning Tools
	FP Alpha	Estate Planning Insights
	Trust & Will	Estate Planning Platform
	Vanilla	V/AI Copilot
	Wealth.com	Scenario Builder
	Whealthcare Planning	WhealthChat
Thought Leadership	Bryn Mawr Trust	Digital Asset Management

	Trust & Will	Financial Advisor and Estate Planning Research Series
	Vanilla	The State of Estate Planning Report 2025
	Wilmington Trust	Emerald GEMs Podcast
Trusts	Bank of America Private Bank	Trust Optimization
	Bryn Mawr Trust	Trust Accounting and Administration
	EncorEstate Plans	Streamlined Trust Digitization and Restatement
	Fiduciary Trust of New England	Awareness and Engagement for NH Trusts
	Trust & Will	Estate Planning Platform
	Voyant	Enhanced Trusts Module
FAMILY OFFICES		
Client Initiative	Callan Family Office	Tax Overlay Program
	Key Family Wealth	Family Office Framework
	leafplanner	Family Facing Platform
	Linscomb Wealth	Family Office Services
	Wealth.com	Family Office Suite
Thought Leadership	AlTi Tiedemann Global	Operational Excellence Report
	BNY Wealth	Family Office Investment Insights
	Family Office Real Estate Institute	Real Estate Education
	Morgan Stanley	Family Legacy and Governance Institute
INDIVIDUAL RIA FIRM LEADERS		
Chief Executive Officer of the Year (AUM Higher Than $25B)	Beacon Pointe Advisors	Shannon Eusey
	Mercer Advisors	Dave Welling
	NewEdge Advisors	Alex Goss
	Pathstone	Matthew Fleissig
	Private Advisor Group	Frank Smith
	Savant Wealth Management	Brent Brodeski
	Steward Partners	Jim Gold
	Wealthspire Advisors	Mike LaMena
Chief Executive Officer of the Year (AUM Lower Than $25B)	Aspiriant	Rob Francais
	Callan Family Office	Jack Ginter
	Concurrent Investment Advisors	Nate Lenz
	Farther	Taylor Matthews
	Independent Advisor Alliance	Robert Russo
	Integrated Partners	Paul Saganey
	Merit Financial Advisors	Rick Kent
	RFG Advisory	Shannon Spotswood
	Snowden Lane Partners	Rob Mooney

	Stratos Wealth Partners	Jeff Concepcion
	Summit Financial	Stan Gregor
	Wescott Financial Advisory Group	Grant Rawdin
Chief Marketing Officer of the Year	Beacon Pointe Advisors	Allison Warner
	Mission Wealth	Michelle Winkles
	Private Advisor Group	Kelly Coulter
	Steward Partners	Greg Banasz
Chief Technology Officer of the Year	Callan Family Office	Dan Burke
	Cresset	Paul Algreen
	Farther	Brad Genser
Client Initiatives	Callan Family Office	Tax Overlay Program
	Choreo	Tax Advantage™ Solution
	Mercer Advisors	Advisor Matching Tool
	NewEdge Wealth	Wealth Ascend
M&A Leader of the Year	AlTi Tiedemann Global	Michael Tiedemann, Chief Executive Officer
	Carson Group	Michael Belluomini, SVP, Mergers and Acquisitions
	Cerity Partners	Claire O'Keefe, Partner and Head of Partner Development
	Modern Wealth Management	Jason Gordo, Co-Founder and President
	Pathstone	Kevin Casey, Managing Director of Corporate Development and Strategy
	Wealth Enhancement Group	Jim Cahn, Chief Strategy Officer
Rising Star of the Year Honorees	AlphaCore Wealth Advisory	Aidan Walsh, Partner, Head of Corporate Development
	Anchor Bay Capital	Blake Pinyan, Senior Financial Planner and Tax Manager
	Cassaday & Co.	Riley Saunders, Financial Advisor
	Choreo	Krista Baumgardner, Director of Wealth Management
	Falcon Wealth Planning	Zackary Royce, Regional Director
	intellicents	Maranda Tufte, Director of Marketing
	Oak Summit Wealth Management	Michael Randall, Owner/Financial Planner
	Perigon Wealth Management	Danny McAuliffe, Wealth Advisor
	RFG Advisory	Jordan Hutchison, VP of Technology and Operations
	Savant Wealth Management	Ashley R. Olivas, Financial Advisor
Thought Leader of the Year	AlphaCore Wealth Advisory	Eric Gerster, Partner, Chief Investment Officer
	Ballast Rock Private Wealth	Jim Carroll, Senior Wealth Advisor and Portfolio Manager

	Bogart Wealth	James Bogart, Founder and CEO
	Boyer Financial Group	Drew Boyer, Founder and CEO
	Integrated Partners	Paul Saganey, CEO and Founder
	Mercer Advisors	Don Calcagni, Chief Investment Officer
	Sanctuary Wealth	Mary Ann Bartels, Chief Investment Strategist
INDUSTRY ASSOCIATIONS		
	ADISA	Alternative Investments Industry Education
	Digital Assets Council of Financial Professionals	Blockchain and Digital Assets Certification
	FinServ Foundation	Fellowship Program
	The Alliance for Lifetime Income	Ali: AI-Powered Chatbot
	The American College of Financial Services	Horizons 2025
	The Chartered Alternative Investment Analyst Association	Alternative Investments Report
INDUSTRY RESEARCH PROVIDERS		
	Certified Financial Planner Board of Standards	Quarterly Consumer Research
	Morningstar Investment Management (Morningstar Retirement)	U.S. Retirement Outcome Model
	Research Affiliates	Interactive Asset Allocation Tool
	The Oasis Group	Peaks Research and AI Wealthtech Map
INSURANCE		
	Halo Investing	Advisor Insurance Desk
	Holistiplan	Personal Risk Reviews
	Lincoln Financial	Estate Lock
	New York Life Investments Advisor Advancement Institute	Succession Planning Research
	Pacific Life	Registered Index-Linked Annuities
	The Pinnacle Group	RIA Variable Annuity Solutions
M&A DEAL SUPPORT		
	Alaris Acquisitions	AI-Driven M&A Matchmaking
	DealRoom	DealRoom AI
	ECHELON Partners	RIA M&A Deal Report
	Elevation Point	Minority Stake RIA Growth Partnership
	Gladstone Group	Gladstone Connect
	OnBord	OnBord Platform
	RIA Growth Catalyst	AI-Powered Insights Platform
	Turkey Hill Management	M&A Advisory Service Without Success Fees
MARKETING | PR FIRMS		
Digital Campaign of the Year	Ficomm Partners	Digital-First Advisors Campaign for Allworth
	Three Crowns Copywriting and Marketing	Net Positive Consortium Brand Campaign

PR Campaign of the Year	Craft & Capital	BondBloxx Campaign
	Gregory FCA	Homrich Berg Campaign
	Hewes Communications	Research Affiliates NIXT Index and ETF Campaign
	Keramas	Calamos Downside Protection ETFs Campaign
	Lyceus Group	Clough Capital Campaign
	Vocatus	Callan Family Office Campaign
	Water & Wall	Snowden Lane Campaign
PHILANTHROPY		
	Brighton Jones	Richer Life Foundation
	Daylight	Certified Impact Philanthropy Advisor Program
	Fidelity Charitable	Philanthropic Education for Advisors
	Foundation for Financial Planning	Aspiring CFP Professionals Survey
	Foundation Source	Leveraging PhilTech
	GiveTeam	Scalable Philanthropic Advice
	Signature Estate & Investment Advisors	Signature Fund for Giving
	TIFIN Give	Charitable Giving for the Next Generation
PODCASTS		
Industry Focused	Catchlight	Grow Organically
	Coldstream Wealth Management	The COO Roundtable
	Emigrant Partners	RIA+
	Ficomm Partners	Growth Leaders of Wealth Management
	Idea Decanter	The Real #Finfluencers
	Milemarker	Next Level
	Orion	Standard Deviations
	The American College of Financial Services	Shares
	Triad Partners	Do Business. Do Life.
	WisdomTree	The Next Big Thing
	XY Planning Network	Behind the Advisor
Investor Focused	BFG Financial Advisors	Don't Retire... Graduate!
	First National Wealth Management	A Common Cents Approach to Personal Finance
	FS Investments	The Takeaway with Troy Gayeski
	Key Wealth	Key Wealth Matters
	Mitlin Financial	Mitlin Money Mindset®
	Stash Wealth	Ambitious 30-Somethings
	The Haverford Trust Company	Speaking of Quality
PROFESSIONAL SERVICES FIRMS		
Chief Executive Officer of the Year	Ellevate	Michelle Odom
	Ficomm Partners	Megan Carpenter
	Gregory FCA	Joe Anthony

	Haven Tower	Joe Kuo
	MarketCounsel Consulting | Hamburger Law Firm	Brian Hamburger
	StreetCred PR	Jason Lahita
	The Oasis Group	John O'Connell
	Turkey Hill Management	Jessica Polito
RETIREMENT PLAN SUPPORT AND ADVISOR SERVICES		
401(k)Technology	BidMoni	Predictive Plan Design
	PenChecks Trust	NextLevel IRA
	Pension Resource Institute	RolloverAdvantage
	Pontera	Orion Trading Integration
Convergence > Wealth and Retirement Integration	Absolute Capital Management	Held-Away Account Management
	Financial Finesse	Financial Coaching
	Future Capital	Wealth and Retirement Come Together
	Morningstar Investment Management (Morningstar Retirement)	Personal Finance Builder
	Pontera	Orion Trading Integration
Corporate Retirement Leader of the Year	Ascensus	David Musto, Chair and CEO
	OneDigital Investment Advisors	Vincent Morris, President
	Vestwell	Modern Record-Keeping Platform
DCIO Providers > Advisor Value Added Programs	Franklin Templeton	ACES Program
	Nuveen	nextAdvisor Strategies
	PGIM DC Solutions	Advice Engine Retirement Planning Tool
In-plan Retirement Income - Product or Service	401(k) Annuity Hub	Annuities in 401(k)s Market Intelligence Tool
	Future Capital	Wealth and Retirement Come Together
	Nestimate	Retirement Income Platform
	Vestwell	Aaron Schumm, CEO
Record Keepers > Retirement Plan Advisor Support	401GO	Advisor Partner Portal
	Ascensus	Plug in - All Things PEP
	Manulife John Hancock	FutureStep
RPA Service	Cambridge Investment Research	RPA Program
	PenChecks Trust	NextLevel IRA
	Principal Financial Group	Enrollment and Education Toolkit
	Raymond James	Advisor Fiduciary Solutions

TAMPs		
Model Marketplaces	Absolute Capital Management	Held-Away Account Management
	Advyzon Investment Management	Nucleus Model Marketplace
	Dynasty Financial Partners	Model Select
	Orion	Model Search and Comparison
TAMPs	Advyzon Investment Management	Tax Optimization and Sphere Platform
	Amplify Platform	Clarity CRM Ecosystem
	AssetMark	Investment Platform
	Envestnet	Wealth Management Platform
	GeoWealth	Public-Private UMAs
	Smartleaf Asset Management	Automated Unified Managed Households
	UX Wealth Partners	Xperience Platform
	Zoe Financial	NextGen TAMP for Personalized Advice
TECHNOLOGY PROVIDERS		
Account Aggregation	eMoney Advisor	eMoney Aggregation Service
	Future Capital	Holistic Retirement Planning
	Zephyr	Performance in Micro Apps
Alternative Investment Platforms	CAIS	Alternative Investment Platform
	Canoe Intelligence	Canoe Asset Data
	Hamilton Lane	End-to-End Private Markets Solution
	iCapital	Distributed Ledger Technology Platform
	InvestCloud	Private Markets Account
	Opto Investments	Fund Explorer
	SS&C Accord	Scaling Alternatives
Artificial Intelligence > Marketing and Lead Generation	Catchlight	Estimated Investable Assets Model
	FINNY AI	Ai-Enabled Organic Growth Engine
	Hummingbird	LinkedIn Automation Platform
	Snappy Kraken	AI-Powered Lead Capture
	WealthFeed	AI-Powered Organic Growth Platform
Artificial Intelligence > Meeting Support	Focal	Omni-Channel Meeting Automation
	Jump	Advisor AI
	Seismic	Seismic for Meetings
	Zeplyn	Agentic AI Assistant
	Zocks	Privacy-First AI Platform
Artificial Intelligence > Workflow Automation	Archive Intel	Compliance AI Agent

	Communify Fincentric	AI Workflow Automation
	Nitrogen	AI Statement Capture
	RegVerse	Fusion 1
	Wealth.com	Ester AI
	YCharts	AI Chat
Business Support Systems	AdvicePay	AdvicePay Business Support
	Bento Engine	Bento Content Portal
	CAIS	AMP Enterprise Solution
	CogniCor	Home Office Copilot
	Docupace	The Docupace Platform
	Egnyte	Cloud Collaboration Solution
Cash Optimization	Axos Advisor Services	Enhanced Cash Management Integration
	Flourish	Flourish Cash
	IMTC	Fixed Income Platform
Chief Executive Officer of the Year	Advyzon	Hailin Li
	Alles Technology	Maxwell Alles
	Catchlight	Wilbur Swan
	Conquest Planning	Mark Evans
	iCapital	Lawrence Calcano
	Jump	Parker Ence
	Orion	Natalie Wolfsen
	Trust & Will	Cody Barbo
	Wealth.com	Rafael Loureiro
	Zeplyn	Era Jain
Chief Marketing Officer of the Year	CAIS	Alex Cavalieri
	Docupace	Ryan George
	FMG Suite	Susan Theder
	Holistiplan	Laura Beaulieu
	Orion	Betsy Perez
Chief Technology Officer of the Year	Addepar	Bob Pisani
	CAIS	Kan Kotecha
	Holistiplan	Scott Pittman
	Jump	Adam Kirk
	Zeplyn	Divam Jain

Client Onboarding / New Account Opening	Advisor360°	Next Generation Bulk Onboarding
	OneVest	Digital Onboarding Platform
	PreciseFP	PreciseFP Onboarding
	SEI	Implement Integrations
	SIGNiX	Secure Digital Signatures
	Voyant, Inc.	Intelligent Fact Find
Client Portals	Advyzon	Advyzon 3.0 Client Portal
	eMoney Advisor	Premium Client Portal
	Fynancial	Branded Client Portal
	SS&C Black Diamond	Widgetizing the Client Experience
Compliance	Advisor360°	Advisors and Political Contributions
	Amplify Reviews	Compliant Testimonial Platform
	Archive Intel	AI-Powered Archiving Program
	LeapXpert	Communications Platform
	RegVerse	Fusion 1
	Testimonial iQ	Compliant Google Reviews
CRM	Advyzon	Upgraded CRM Workflows
	Envestnet	Schwab Advisor Services Integration
	Practifi	Advisor Efficiency and Client Engagement
Data Lakes/Warehouses	BetaNXT	DataXChange
	Invent	Data LakeHouse
	Milemarker	Data Cloud
Digital Marketing Campaign of the Year	AdvicePay	AdvicePay Showcase
	Amplify Reviews	Blended Testimonial Strategy
	Broadridge Financial Solutions	Blueprint for Brilliance
	CAIS	Mercer Survey
	Holistiplan	Tax Summit
	Zephyr	PSN eBook Series
Direct Indexing	Alpathena	Direct Indexing Platform
	Brooklyn Investment Group	Long/Short Tax Management Capabilities
	Envestnet	Customizable Options Strategy
	FINIAT	Intelligent Indexing®
	Orion	Custom Indexing Proposal and Onboarding Enhancements

	Rowboat Advisors	UMA Functionality
	Syntax Data	Syntax Direct Platform
Financial Planning	Asset-Map	Relationship Maps
	Conquest Planning	AI-Driven Innovation
	eMoney Advisor	Needs Analysis
	Moneytree Software	Modernized Platform Enhancements
Innovation New Applications	Advisor360°	Advisors and Political Contributions
	Alaris Acquisitions	AI-Driven M&A Matchmaking
	Idea Decanter	FinKit
	Milemarker	Data Lake
	MSCI Wealth	Similarity Score
	Pebble Finance	Pebble AI
	Whealthcare Planning	WhealthChat
Innovation Platforms	Catchlight	Lead Routing Decision Support Model
	GeoWealth	Public-Private UMAs
	Halo Investing	Structured Notes Analysis
	Nestimate	Retirement Income Platform
	OneVest	Next Best Action Powered by AI
	Opto Investments	Fund Explorer
	Vise Technologies	The Vise Platform
Marketing Automation	CION Investments	Advisor I/O
	FMG Suite	From 7 to 50 Automations
	Hummingbird	LinkedIn Automation Platform
	SmartAsset	Advisor Marketing Platform
Model Marketplaces	Advyzon Investment Management	Nucleus Model Marketplace
	Halo Investing	Protective Investment Strategies
	SEI	Portfolio Evaluator
	SMArtX Advisory Solutions	Managed Investment Products
Outsourcing Platforms (Wealth as Service)	Aquilance	Aquilance: Bill Payment as a Service
	Invent	Invent Store
	Orion	Outsourced Chief Investment Officer
Portfolio Analytics	FINIAT	Intelligent Insights
	Kwanti	Risk Profiling Platform

	MSCI Wealth	MSCI Wealth Manager
	Pebble Finance	Platform Features
Portfolio Management, Accounting and Performance Reporting	InvestSuite	StoryTeller
	MyVest	Modern UMA Platform
	Orion	BeFi-Driven Performance Reporting
	SS&C Black Diamond	Managed Account Services
	SS&C Black Diamond	Intelligent Reporting
	Vestmark	Vestmark Advisor
Rebalancing	Advyzon	Quantum Rebalancer
	d1g1t Inc.	UMA Trading Framework
	intelliflo	Compliance and Tax Management Features
	InvestCloud	Personalized Rebalancing and Tax Optimization Tools
	SimCorp	Axioma WealthVision
Retirement Income Technology	Betterment Advisor Solutions	Digital Solo 401(k)s
	Income Lab	Annuity Planning and Enhanced Tax Features
	Panoramix	RMDs Enhancements
Risk Tolerance / Client Profiling	Andes Risk	Advanced Risk and Behavioral Profiling
	CapIntel	Next-Generation Risk Profile
	Tolerisk	Tolerisk Platform
Securities-based Lending	Axos Advisor Services	SBLOC for Advisors and Clients
	Goldman Sachs Private Bank Select	GS Select Transitions
	Sora Finance	AI-Driven Debt Optimization Enhancements
Specialized Planning Applications	Asset-Map	Relationship Maps
	bQuest	Aging Care Coordination Platform
	Holistiplan	Multi-Year Roth Projection Tool
	Move Health	Healthcare Planning Solution
	TaxStatus	Financial Baseline Report
Thought Leadership	AdvicePay	Fee-for-Service Trend Report
	Andes Risk	The NextGen Risk Framework eBook
	CAIS	CAIS Live
	FMG Suite	2025 Marketing Guide for Financial Advisors
	Income Conductor	Trailblazers Webinars
	Practifi	Women’s History Month Spotlight Series

	Zephyr	Women in Investing
Unified (All-In-One) Systems	Advyzon	Advyzon 3.0 Wealthtech Platform
	Envestnet	Wealth Management Ecosystem Enhancements
	MyVest	Tax-Aware Portfolio Management
	Orion	Connected Tech Ecosystem
	SS&C Black Diamond	Black Diamond Wealth Platform