

# 2025 Wealth Management.com Industry Awards

## WealthManagement.com 2025 Industry Awards Finalists and Honorees by Company

Name of Company	Award Category	Nomination Name
11thEstate   11th.com	DISRUPTORS > Technology	Fund Recovery
1847Financial	BROKER-DEALERS > Chief Executive Officer of the Year	Heather Nagengast
401(k) Annuity Hub	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > In-plan Retirement Income - Product or Service	Annuities in 401(k)s Market Intelligence Tool
401GO	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Record Keepers – Retirement Plan Advisor Support	Advisor Partner Portal
Absolute Capital Management	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Convergence > Wealth and Retirement Integration	Held-Away Account Management
Absolute Capital Management	TAMPs > Model Marketplaces	Held-Away Account Management
Addepar	TECHNOLOGY PROVIDERS > Chief Technology Officer of the Year	Bob Pisani
ADISA	INDUSTRY ASSOCIATIONS	Alternative Investments Industry Education
AdvicePay	TECHNOLOGY PROVIDERS > Business Support Systems	AdvicePay Business Support
AdvicePay	TECHNOLOGY PROVIDERS > Digital Marketing Campaign of the Year	AdvicePay Showcase
AdvicePay	TECHNOLOGY PROVIDERS > Thought Leadership	Fee-for-Service Trend Report
Advisor360°	TECHNOLOGY PROVIDERS > Client Onboarding/New Account Opening	Next Generation Bulk Onboarding
Advisor360°	TECHNOLOGY PROVIDERS > Compliance	Advisors and Political Contributions
Advisor360°	TECHNOLOGY PROVIDERS > Innovation New Applications	Advisors and Political Contributions
Advisory Services Network	ADVISOR SUPPORT PLATFORMS	Small Advisor Support
Advyzon	TECHNOLOGY PROVIDERS > Chief Executive Officer of the Year	Hailin Li
Advyzon	TECHNOLOGY PROVIDERS > Client Portals	Advyzon 3.0 Client Portal
Advyzon	TECHNOLOGY PROVIDERS > CRM	Upgraded CRM Workflows
Advyzon	TECHNOLOGY PROVIDERS > Rebalancing	Quantum Rebalancer
Advyzon	TECHNOLOGY PROVIDERS > Unified (all-in-one) Systems	Advyzon 3.0 Wealthtech Platform
Advyzon Investment Management	TAMPs > Model Marketplaces	Nucleus Model Marketplace
Advyzon Investment Management	TAMPs > TAMPs	Tax Optimization and Sphere Platform
Advyzon Investment Management	TECHNOLOGY PROVIDERS > Model Marketplaces	Nucleus Model Marketplace
Affiliated Advisors	ADVISOR SUPPORT PLATFORMS	Synthesis: NextGen Affiliation Program
Alaris Acquisitions	DISRUPTORS > Technology	M&A Matchmaking
Alaris Acquisitions	M&A DEAL SUPPORT	AI-Driven M&A Matchmaking
Alaris Acquisitions	TECHNOLOGY PROVIDERS > Innovation New Applications	AI-Driven M&A Matchmaking
Alles Technology	TECHNOLOGY PROVIDERS > Chief Executive Officer of the Year	Maxwell Alles
Allspring Global Investments	ASSET MANAGERS > Chief Marketing Officer of the Year	Kelly Vives
Allspring Global Investments	ASSET MANAGERS > Client Experience Initiative	Remi Advisor Portal
Alpathena	TECHNOLOGY PROVIDERS > Direct Indexing	Direct Indexing Platform
AlphaCore Wealth Advisory	INDIVIDUAL RIA FIRMS > Rising Star of the Year	Aidan Walsh, Partner, Head of Corporate Development
AlphaCore Wealth Advisory	INDIVIDUAL RIA FIRMS > Thought Leader of the Year	Eric Gerster, Partner, Chief Investment Officer
AlTi Tiedemann Global	FAMILY OFFICES > Thought Leadership	Operational Excellence Report
AlTi Tiedemann Global	INDIVIDUAL RIA FIRMS > M&A Leader of the Year	Michael Tiedemann, Chief Executive Officer
Altruist	CUSTODIANS > Technology	Technology Integration
Amplify Platform	TAMPs > TAMPs	Clarity CRM Ecosystem
Amplify Reviews	TECHNOLOGY PROVIDERS > Compliance	Compliant Testimonial Platform
Amplify Reviews	TECHNOLOGY PROVIDERS > Digital Marketing Campaign of the Year	Blended Testimonial Strategy

<b>Anchor Bay Capital</b>	INDIVIDUAL RIA FIRMS > Rising Star of the Year	Blake Pinyan, Senior Financial Planner and Tax Manager
<b>Andes Risk</b>	TECHNOLOGY PROVIDERS > Risk Tolerance/Client Profiling	Advanced Risk and Behavioral Profiling
<b>Andes Risk</b>	TECHNOLOGY PROVIDERS > Thought Leadership	The NextGen Risk Framework eBook
<b>Apex Fintech Solutions</b>	CUSTODIANS > Alternative Asset	Apex Alts
<b>Aquilance</b>	TECHNOLOGY PROVIDERS > Outsourcing Platforms (Wealth as Service)	Aquilance: Bill Payment as a Service
<b>Archive Intel</b>	TECHNOLOGY PROVIDERS > Artificial Intelligence > Workflow Automation	Compliance AI Agent
<b>Archive Intel</b>	TECHNOLOGY PROVIDERS > Compliance	AI-Powered Archiving Program
<b>Ares Wealth Management Solutions</b>	ASSET MANAGERS > Alternative Investments	Private Markets
<b>ARQA</b>	DISRUPTORS > Technology	AI-Powered Workflow
<b>Ascensus</b>	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Corporate Retirement Leader of the Year	David Musto, Chair and CEO
<b>Ascensus</b>	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Record Keepers – Retirement Plan Advisor Support	Plug in - All Things PEP
<b>Aspiriant</b>	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Lower Than \$25 Billion)	Rob Francais
<b>Asset-Map</b>	TECHNOLOGY PROVIDERS > Financial Planning	Relationship Maps
<b>Asset-Map</b>	TECHNOLOGY PROVIDERS > Specialized Planning Applications	Relationship Maps
<b>AssetLink</b>	DISRUPTORS > Technology	Relationship Intelligence
<b>AssetMark</b>	TAMPs > TAMPs	Investment Platform
<b>Avantax Wealth Management</b>	BROKER–DEALERS: 1,000 Advisors or More > Practice Management	Peer Mentorship Program
<b>Axos Advisor Services</b>	TECHNOLOGY PROVIDERS > Cash Optimization	Enhanced Cash Management Integration
<b>Axos Advisor Services</b>	TECHNOLOGY PROVIDERS > Securities-based Lending	SBLOC for Advisors and Clients
<b>Axtella</b>	BROKER–DEALERS > Digital Marketing Campaign of the Year	Target City Campaign
<b>Axtella</b>	BROKER–DEALERS > Service	Tech Talks Webinar Series
<b>Ballast Rock Private Wealth</b>	INDIVIDUAL RIA FIRMS > Thought Leader of the Year	Jim Carroll, Senior Wealth Advisor and Portfolio Manager
<b>Bank of America Private Bank</b>	ASSET MANAGERS > Client Experience Initiative	Unified Mobile App
<b>Bank of America Private Bank</b>	ESTATE PLANNING > Trusts	Trust Optimization
<b>Beacon Pointe Advisors</b>	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Higher Than \$25 Billion)	Shannon Eusey
<b>Beacon Pointe Advisors</b>	INDIVIDUAL RIA FIRMS > Chief Marketing Officer of the Year	Allison Warner
<b>Bento Engine</b>	TECHNOLOGY PROVIDERS > Business Support Systems	Bento Content Portal
<b>Bernstein Private Wealth Management</b>	BROKER–DEALERS > Digital Marketing Campaign of the Year	Dessert Explainer Series
<b>Bernstein Private Wealth Management</b>	BROKER–DEALERS > Service	Ultra-High Net Worth Platform
<b>BetaNXT</b>	TECHNOLOGY PROVIDERS > Data Lakes/Warehouses	DataXChange
<b>Betterment Advisor Solutions</b>	TECHNOLOGY PROVIDERS > Retirement Income Technology	Digital Solo 401(k)s
<b>BFG Financial Advisors</b>	PODCASTS > Investor Focused	Don't Retire... Graduate!
<b>BidMoni</b>	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > 401(k) Technology	Predictive Plan Design
<b>BlackRock</b>	ASSET MANAGERS > Portfolio Construction	Public Private Portfolios
<b>BNY Pershing</b>	CUSTODIANS > Practice Management	Next Leaders Cohort Program
<b>BNY Wealth</b>	FAMILY OFFICES > Thought Leadership	Family Office Investment Insights
<b>Bogart Wealth</b>	INDIVIDUAL RIA FIRMS > Thought Leader of the Year	James Bogart, Founder and CEO
<b>BondBloxx</b>	ASSET MANAGERS > ETFs	Private Credit ETF
<b>BondBloxx</b>	ASSET MANAGERS > Fixed Income	Private Credit ETF
<b>Boyer Financial Group</b>	INDIVIDUAL RIA FIRMS > Thought Leader of the Year	Drew Boyer, Founder and CEO
<b>bQuest</b>	DISRUPTORS > Industry	Aging Care Coordination Platform
<b>bQuest</b>	TECHNOLOGY PROVIDERS > Specialized Planning Applications	Aging Care Coordination Platform
<b>Brighton Jones</b>	CORPORATE SOCIAL RESPONSIBILITY	B Corp Designation
<b>Brighton Jones</b>	PHILANTHROPY	Richer Life Foundation
<b>Broadridge Financial Solutions</b>	TECHNOLOGY PROVIDERS > Digital Marketing Campaign of the Year	Blueprint for Brilliance
<b>Brooklyn Investment Group</b>	TECHNOLOGY PROVIDERS > Direct Indexing	Long/Short Tax Management Capabilities

<b>Bryn Mawr Trust</b>	ESTATE PLANNING > Technology	Tax and Retirement Planning Tools
<b>Bryn Mawr Trust</b>	ESTATE PLANNING > Thought Leadership	Digital Asset Management
<b>Bryn Mawr Trust</b>	ESTATE PLANNING > Trusts	Trust Accounting and Administration
<b>CAIS</b>	TECHNOLOGY PROVIDERS > Chief Marketing Officer of the Year	Alex Cavalieri
<b>CAIS</b>	TECHNOLOGY PROVIDERS > Chief Technology Officer of the Year	Kan Kotecha
<b>CAIS</b>	TECHNOLOGY PROVIDERS > Alternative Investment Platforms	Alternative Investment Platform
<b>CAIS</b>	TECHNOLOGY PROVIDERS > Business Support Systems	AMP Enterprise Solution
<b>CAIS</b>	TECHNOLOGY PROVIDERS > Digital Marketing Campaign of the Year	Mercer Survey
<b>CAIS</b>	TECHNOLOGY PROVIDERS > Thought Leadership	CAIS Live
<b>Calamos Investments</b>	ASSET MANAGERS > Alternative Investments	Risk Management
<b>Calamos Investments</b>	ASSET MANAGERS > ETFs	Structured Protection ETFs
<b>Callan Family Office</b>	FAMILY OFFICES > Client Initiative	Tax Overlay Program
<b>Callan Family Office</b>	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Lower Than \$25 Billion)	Jack Ginter
<b>Callan Family Office</b>	INDIVIDUAL RIA FIRMS > Chief Technology Officer of the Year	Dan Burke
<b>Callan Family Office</b>	INDIVIDUAL RIA FIRMS > Client Initiatives	Tax Overlay Program
<b>Cambridge Investment Research</b>	BROKER–DEALERS > Service	Private Client Services
<b>Cambridge Investment Research</b>	CORPORATE SOCIAL RESPONSIBILITY	Next Step® Internship
<b>Cambridge Investment Research</b>	DIVERSITY, EQUITY AND INCLUSION	Community of Women Program
<b>Cambridge Investment Research</b>	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > RPA Service	RPA Program
<b>Canoe Intelligence</b>	TECHNOLOGY PROVIDERS > Alternative Investment Platforms	Canoe Asset Data
<b>CapIntel</b>	TECHNOLOGY PROVIDERS > Risk Tolerance/Client Profiling	Next-Generation Risk Profile
<b>Capital Group</b>	ASSET MANAGERS > ETFs	Active Fixed Income ETF Education
<b>Carson Group</b>	INDIVIDUAL RIA FIRMS > M&A Leader of the Year	Michael Belluomini, SVP, Mergers and Acquisitions
<b>CaskX</b>	ASSET MANAGERS > Alternative Investments	Whiskey Investment Platform
<b>Cassaday &amp; Co.</b>	INDIVIDUAL RIA FIRMS > Rising Star of the Year	Riley Saunders, Financial Advisor
<b>Catchlight</b>	PODCASTS > Industry Focused	Grow Organically
<b>Catchlight</b>	TECHNOLOGY PROVIDERS > Chief Executive Officer of the Year	Wilbur Swan
<b>Catchlight</b>	TECHNOLOGY PROVIDERS > Artificial Intelligence > Marketing and Lead Generation	Estimated Investable Assets Model
<b>Catchlight</b>	TECHNOLOGY PROVIDERS > Innovation Platforms	Lead Routing Decision Support Model
<b>CAZ Investments</b>	ASSET MANAGERS > New Product Development	Alternative Investments Registered Fund
<b>CAZ Investments</b>	ASSET MANAGERS > Thought Leadership	Alternative Investments Education
<b>Cerity Partners</b>	INDIVIDUAL RIA FIRMS > M&A Leader of the Year	Claire O'Keefe, Partner and Head of Partner Development
<b>Certified Financial Planner Board of Standards</b>	INDUSTRY RESEARCH PROVIDERS	Quarterly Consumer Research
<b>Cetera</b>	BROKER–DEALERS > Digital Marketing Campaign of the Year	Omni Channel Campaign
<b>Cetera Financial Group</b>	BROKER–DEALERS > Transition Support	Onboarding Navigator
<b>Choreo</b>	INDIVIDUAL RIA FIRMS > Rising Star of the Year	Krista Baumgardner, Director of Wealth Management
<b>Choreo</b>	INDIVIDUAL RIA FIRMS > Client Initiatives	Tax Advantage™ Solution
<b>CION Investments</b>	TECHNOLOGY PROVIDERS > Marketing Automation	Advisor I/O
<b>CogniCor</b>	TECHNOLOGY PROVIDERS > Business Support Systems	Home Office Copilot
<b>CoinDesk Indices</b>	DISRUPTORS > Industry	CoinDesk 20
<b>Coldstream Wealth Management</b>	PODCASTS > Industry Focused	The COO Roundtable
<b>Communify Fincentric</b>	TECHNOLOGY PROVIDERS > Artificial Intelligence > Workflow Automation	AI Workflow Automation
<b>COMPLY</b>	COMPLIANCE/LAW FIRMS	COMPLY Program
<b>Concorde Investment Services</b>	BROKER-DEALERS > Chief Executive Officer of the Year	Danielle Delongchamp
<b>Concorde Investment Services</b>	BROKER–DEALERS: Fewer Than 1,000 Advisors > Technology	Elevated Experience Technology
<b>Concurrent Investment Advisors</b>	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Lower Than \$25 Billion)	Nate Lenz
<b>Conquest Planning</b>	TECHNOLOGY PROVIDERS > Chief Executive Officer of the Year	Mark Evans

<b>Conquest Planning</b>	TECHNOLOGY PROVIDERS > Financial Planning	AI-Driven Innovation
<b>Craft &amp; Capital</b>	MARKETING   PR FIRMS > Client PR Campaign of the Year	BondBloxx Campaign
<b>Cresset</b>	INDIVIDUAL RIA FIRMS > Chief Technology Officer of the Year	Paul Algreen
<b>d1g1t Inc.</b>	TECHNOLOGY PROVIDERS > Rebalancing	UMA Trading Framework
<b>Daylight</b>	PHILANTHROPY	Certified Impact Philanthropy Advisor Program
<b>DealRoom</b>	M&A DEAL SUPPORT	DealRoom AI
<b>Digital Assets Council of Financial Professionals</b>	DISRUPTORS > Industry	Blockchain and Digital Assets Certification
<b>Digital Assets Council of Financial Professionals</b>	INDUSTRY ASSOCIATIONS	Blockchain and Digital Assets Certification
<b>Docupace</b>	TECHNOLOGY PROVIDERS > Chief Marketing Officer of the Year	Ryan George
<b>Docupace</b>	TECHNOLOGY PROVIDERS > Business Support Systems	The Docupace Platform
<b>Dunham &amp; Associates Investment Counsel</b>	ASSET MANAGERS > Thought Leadership	Retirement Planning White Paper
<b>Dynasty Financial Partners</b>	TAMPs > Model Marketplaces	Model Select
<b>Eaton Vance's U.S. Charitable Gift Trust</b>	ASSET MANAGERS > New Product Development	Charitable Gift Trust
<b>Eaton Vance's U.S. Charitable Gift Trust</b>	ESTATE PLANNING > Advisor Service and Support	Estate Planning Tool
<b>Eaton Vance's U.S. Charitable Gift Trust</b>	ESTATE PLANNING > Implementation	Estate Planning Tool
<b>ECHELON Partners</b>	M&A DEAL SUPPORT	RIA M&A Deal Report
<b>Egnyte</b>	TECHNOLOGY PROVIDERS > Business Support Systems	Cloud Collaboration Solution
<b>Elevation Point</b>	M&A DEAL SUPPORT	Minority Stake RIA Growth Partnership
<b>Ellevest</b>	PROFESSIONAL SERVICES FIRMS > Chief Executive Officer of the Year	Michelle Odom
<b>Emigrant Partners</b>	PODCASTS > Industry Focused	RIA+
<b>eMoney Advisor</b>	TECHNOLOGY PROVIDERS > Account Aggregation	eMoney Aggregation Service
<b>eMoney Advisor</b>	TECHNOLOGY PROVIDERS > Client Portals	Premium Client Portal
<b>eMoney Advisor</b>	TECHNOLOGY PROVIDERS > Financial Planning	Needs Analysis
<b>EncorEstate Plans</b>	ESTATE PLANNING > Implementation	Standalone Deed Service
<b>EncorEstate Plans</b>	ESTATE PLANNING > Trusts	Streamlined Trust Digitization and Restatement
<b>Envestnet</b>	TAMPs > TAMPs	Wealth Management Platform
<b>Envestnet</b>	TECHNOLOGY PROVIDERS > CRM	Schwab Advisor Services Integration
<b>Envestnet</b>	TECHNOLOGY PROVIDERS > Direct Indexing	Customizable Options Strategy
<b>Envestnet</b>	TECHNOLOGY PROVIDERS > Unified (all-in-one) Systems	Wealth Management Ecosystem Enhancements
<b>F/m Investments</b>	ASSET MANAGERS > Chief Executive Officer of the Year	Alex Morris
<b>Falcon Wealth Planning</b>	INDIVIDUAL RIA FIRMS > Rising Star of the Year	Zackary Royce, Regional Director
<b>Family Office Real Estate Institute</b>	FAMILY OFFICES > Thought Leadership	Real Estate Education
<b>Farther</b>	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Lower Than \$25 Billion)	Taylor Matthews
<b>Farther</b>	INDIVIDUAL RIA FIRMS > Chief Technology Officer of the Year	Brad Genser
<b>Ficomm Partners</b>	MARKETING   PR FIRMS > Client Digital Campaign of the Year	Digital-First Advisors Campaign for Allworth
<b>Ficomm Partners</b>	PODCASTS > Industry Focused	Growth Leaders of Wealth Management
<b>Ficomm Partners</b>	PROFESSIONAL SERVICES FIRMS > Chief Executive Officer of the Year	Megan Carpenter
<b>Fidelis Capital Partners</b>	ASSET MANAGERS > Fixed Income	Fixed Income SMA Strategy
<b>Fidelity Charitable</b>	PHILANTHROPY	Philanthropic Education for Advisors
<b>Fidelity Investments</b>	ASSET MANAGERS > Alternative Investments	Alternative Investments
<b>Fidelity Investments</b>	ASSET MANAGERS > New Product Development	Digital Assets Portfolios
<b>Fidelity Investments</b>	CUSTODIANS > Practice Management	Organic Growth Strategy
<b>Fiduciary Trust Company</b>	CUSTODIANS > Transition Support	Custody Transitions
<b>Fiduciary Trust Company</b>	ESTATE PLANNING > Advisor Service and Support	Estate Planning Education
<b>Fiduciary Trust of New England</b>	ESTATE PLANNING > Trusts	Awareness and Engagement for NH Trusts
<b>Financial Finesse</b>	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Convergence > Wealth and Retirement Integration	Financial Coaching

<b>FINIAT</b>	TECHNOLOGY PROVIDERS > Direct Indexing	Intelligent Indexing®
<b>FINIAT</b>	TECHNOLOGY PROVIDERS > Portfolio Analytics	Intelligent Insights
<b>FINNY AI</b>	TECHNOLOGY PROVIDERS > Artificial Intelligence > Marketing and Lead Generation	Ai-Enabled Organic Growth Engine
<b>FinServ Foundation</b>	CORPORATE SOCIAL RESPONSIBILITY	Young Advisor Development Program
<b>FinServ Foundation</b>	INDUSTRY ASSOCIATIONS	Fellowship Program
<b>First National Wealth Management</b>	PODCASTS > Investor Focused	A Common Cents Approach to Personal Finance
<b>Flourish</b>	TECHNOLOGY PROVIDERS > Cash Optimization	Flourish Cash
<b>FMG Suite</b>	TECHNOLOGY PROVIDERS > Chief Marketing Officer of the Year	Susan Theder
<b>FMG Suite</b>	TECHNOLOGY PROVIDERS > Marketing Automation	From 7 to 50 Automations
<b>FMG Suite</b>	TECHNOLOGY PROVIDERS > Thought Leadership	2025 Marketing Guide for Financial Advisors
<b>Focal</b>	TECHNOLOGY PROVIDERS > Artificial Intelligence > Meeting Support	Omni-Channel Meeting Automation
<b>Foundation for Financial Planning</b>	PHILANTHROPY	Aspiring CFP Professionals Survey
<b>Foundation Source</b>	PHILANTHROPY	Leveraging PhilTech
<b>FP Alpha</b>	ESTATE PLANNING > Technology	Estate Planning Insights
<b>Franklin Templeton</b>	ASSET MANAGERS > Client Experience Initiative	Personalized Resource Dashboard
<b>Franklin Templeton</b>	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > DCIO Providers – Advisor Value Added Programs	ACES Program
<b>FS Investments</b>	PODCASTS > Investor Focused	The Takeaway with Troy Gayeski
<b>FSC Wealth Advisors</b>	CORPORATE SOCIAL RESPONSIBILITY	HER Wealth Program
<b>Future Capital</b>	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Convergence > Wealth and Retirement Integration	Wealth and Retirement Come Together
<b>Future Capital</b>	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > In-plan Retirement Income - Product or Service	Wealth and Retirement Come Together
<b>Future Capital</b>	TECHNOLOGY PROVIDERS > Account Aggregation	Holistic Retirement Planning
<b>Fynancial</b>	DISRUPTORS > Technology	Branded Client Portal
<b>Fynancial</b>	TECHNOLOGY PROVIDERS > Client Portals	Branded Client Portal
<b>GeoWealth</b>	TAMPs > TAMPs	Public-Private UMAs
<b>GeoWealth</b>	TECHNOLOGY PROVIDERS > Innovation Platforms	Public-Private UMAs
<b>GiveTeam</b>	PHILANTHROPY	Scalable Philanthropic Advice
<b>Gladstone Group</b>	M&A DEAL SUPPORT	Gladstone Connect
<b>Global X ETFs</b>	ASSET MANAGERS > Chief Marketing Officer of the Year	Christopher Adams
<b>Goldman Sachs Advisor Solutions</b>	CUSTODIANS > Alternative Asset	Access to Alternative Investments
<b>Goldman Sachs Advisor Solutions</b>	CUSTODIANS > Transition Support	Digital Onboarding
<b>Goldman Sachs Private Bank Select</b>	TECHNOLOGY PROVIDERS > Securities-based Lending	GS Select Transitions
<b>Gregory FCA</b>	MARKETING   PR FIRMS > Client PR Campaign of the Year	Homrich Berg Campaign
<b>Gregory FCA</b>	PROFESSIONAL SERVICES FIRMS > Chief Executive Officer of the Year	Joe Anthony
<b>Halo Investing</b>	INSURANCE	Advisor Insurance Desk
<b>Halo Investing</b>	TECHNOLOGY PROVIDERS > Innovation Platforms	Structured Notes Analysis
<b>Halo Investing</b>	TECHNOLOGY PROVIDERS > Model Marketplaces	Protective Investment Strategies
<b>Hamilton Lane</b>	TECHNOLOGY PROVIDERS > Alternative Investment Platforms	End-to-End Private Markets Solution
<b>Harris   Oakmark</b>	ASSET MANAGERS > New Product Development	Large Cap ETF
<b>Haven Tower</b>	PROFESSIONAL SERVICES FIRMS > Chief Executive Officer of the Year	Joe Kuo
<b>Hewes Communications</b>	MARKETING   PR FIRMS > Client PR Campaign of the Year	Research Affiliates NIXT Index and ETF Campaign
<b>Holistiplan</b>	DIVERSITY, EQUITY AND INCLUSION	Initiatives in Academia
<b>Holistiplan</b>	INSURANCE	Personal Risk Reviews
<b>Holistiplan</b>	TECHNOLOGY PROVIDERS > Chief Marketing Officer of the Year	Laura Beaulieu
<b>Holistiplan</b>	TECHNOLOGY PROVIDERS > Chief Technology Officer of the Year	Scott Pittman
<b>Holistiplan</b>	TECHNOLOGY PROVIDERS > Digital Marketing Campaign of the Year	Tax Summit
<b>Holistiplan</b>	TECHNOLOGY PROVIDERS > Specialized Planning Applications	Multi-Year Roth Projection Tool

<b>HPA Exchange</b>	ASSET MANAGERS > Alternative Investments	Healthcare-Focused 1031 Exchange
<b>Hummingbird</b>	TECHNOLOGY PROVIDERS > Artificial Intelligence > Marketing and Lead Generation	LinkedIn Automation Platform
<b>Hummingbird</b>	TECHNOLOGY PROVIDERS > Marketing Automation	LinkedIn Automation Platform
<b>iCapital</b>	TECHNOLOGY PROVIDERS > Chief Executive Officer of the Year	Lawrence Calcano
<b>iCapital</b>	TECHNOLOGY PROVIDERS > Alternative Investment Platforms	Distributed Ledger Technology Platform
<b>Idea Decanter</b>	PODCASTS > Industry Focused	The Real #Finfluencers
<b>Idea Decanter</b>	TECHNOLOGY PROVIDERS > Innovation New Applications	FinKit
<b>IMTC</b>	TECHNOLOGY PROVIDERS > Cash Optimization	Fixed Income Platform
<b>Income Conductor</b>	TECHNOLOGY PROVIDERS > Thought Leadership	Trailblazers Webinars
<b>Income Lab</b>	TECHNOLOGY PROVIDERS > Retirement Income Technology	Annuity Planning and Enhanced Tax Features
<b>Independent Advisor Alliance</b>	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Lower Than \$25 Billion)	Robert Russo
<b>Integrated Partners</b>	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Lower Than \$25 Billion)	Paul Saganey
<b>Integrated Partners</b>	INDIVIDUAL RIA FIRMS > Thought Leader of the Year	Paul Saganey, CEO and Founder
<b>intellicients</b>	INDIVIDUAL RIA FIRMS > Rising Star of the Year	Maranda Tufte, Director of Marketing
<b>intelliflo</b>	TECHNOLOGY PROVIDERS > Rebalancing	Compliance and Tax Management Features
<b>Interactive Brokers</b>	CUSTODIANS > Technology	AI Commentary Generator
<b>Invent</b>	TECHNOLOGY PROVIDERS > Data Lakes/Warehouses	Data LakeHouse
<b>Invent</b>	TECHNOLOGY PROVIDERS > Outsourcing Platforms (Wealth as Service)	Invent Store
<b>InvestCloud</b>	DISRUPTORS > Technology	Private Markets Account
<b>InvestCloud</b>	TECHNOLOGY PROVIDERS > Alternative Investment Platforms	Private Markets Account
<b>InvestCloud</b>	TECHNOLOGY PROVIDERS > Rebalancing	Personalized Rebalancing and Tax Optimization Tools
<b>InvestSuite</b>	TECHNOLOGY PROVIDERS > Portfolio Management, Accounting and Performance Reporting	StoryTeller
<b>Jackson</b>	ASSET MANAGERS > Thought Leadership	Is 100 the New 70?
<b>Janney Montgomery Scott</b>	BROKER-DEALERS > Transition Support	Client Onboarding Tool
<b>Janney Montgomery Scott</b>	BROKER-DEALERS: Fewer Than 1,000 Advisors > Practice Management	Practice Management Support
<b>Janney Montgomery Scott</b>	BROKER-DEALERS: Fewer Than 1,000 Advisors > Technology	Portfolio Construction Tool
<b>Jump</b>	TECHNOLOGY PROVIDERS > Chief Executive Officer of the Year	Parker Ence
<b>Jump</b>	TECHNOLOGY PROVIDERS > Chief Technology Officer of the Year	Adam Kirk
<b>Jump</b>	TECHNOLOGY PROVIDERS > Artificial Intelligence > Meeting Support	Advisor AI
<b>Keramas</b>	MARKETING   PR FIRMS > Client PR Campaign of the Year	Calamos Downside Protection ETFs Campaign
<b>Kestra Investment Management</b>	ASSET MANAGERS > Portfolio Construction	Portfolio Solutions
<b>Key Bridge Compliance</b>	COMPLIANCE/LAW FIRMS	Compliance Support
<b>Key Family Wealth</b>	FAMILY OFFICES > Client Initiative	Family Office Framework
<b>Key Wealth</b>	PODCASTS > Investor Focused	Key Wealth Matters
<b>Kwanti</b>	TECHNOLOGY PROVIDERS > Portfolio Analytics	Risk Profiling Platform
<b>leafplanner</b>	FAMILY OFFICES > Client Initiative	Family Facing Platform
<b>LeapXpert</b>	TECHNOLOGY PROVIDERS > Compliance	Communications Platform
<b>Lincoln Financial</b>	INSURANCE	Estate Lock
<b>Linscomb Wealth</b>	FAMILY OFFICES > Client Initiative	Family Office Services
<b>LPL Financial</b>	BROKER-DEALERS: 1,000 Advisors or More > Technology	AI and the Client/Advisor Experience
<b>LPL Financial</b>	CHIEF TECHNOLOGY OFFICER OF THE YEAR	Greg Gates
<b>Lyceus Group</b>	MARKETING   PR FIRMS > Client PR Campaign of the Year	Clough Capital Campaign
<b>Manulife John Hancock</b>	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Record Keepers – Retirement Plan Advisor Support	FutureStep
<b>MarketCounsel Consulting   Hamburger Law Firm</b>	PROFESSIONAL SERVICES FIRMS > Chief Executive Officer of the Year	Brian Hamburger
<b>Meeder Investment Management</b>	ASSET MANAGERS > Chief Marketing Officer of the Year	Leah Curtis



<b>Meeder Investment Management</b>	ASSET MANAGERS > Digital Marketing Campaign of the Year	National Accounts Campaign
<b>Meeder Investment Management</b>	ASSET MANAGERS > Thought Leadership	The Conundrum: Investment Education
<b>Meketa Capital</b>	ASSET MANAGERS > Alternative Investments	Private Infrastructure Investments
<b>Mercer Advisors</b>	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Higher Than \$25 Billion)	Dave Welling
<b>Mercer Advisors</b>	INDIVIDUAL RIA FIRMS > Thought Leader of the Year	Don Calcagni, Chief Investment Officer
<b>Mercer Advisors</b>	INDIVIDUAL RIA FIRMS > Client Initiatives	Advisor Matching Tool
<b>Merit Financial Advisors</b>	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Lower Than \$25 Billion)	Rick Kent
<b>Merrill Wealth Management</b>	BROKER–DEALERS > Thought Leadership	Women's Wealth & Wisdom Symposium
<b>Merrill Wealth Management</b>	BROKER–DEALERS: 1,000 Advisors or More > Practice Management	Level Up Your Practice Training Program
<b>Milemarker</b>	PODCASTS > Industry Focused	Next Level
<b>Milemarker</b>	TECHNOLOGY PROVIDERS > Data Lakes/Warehouses	Data Cloud
<b>Milemarker</b>	TECHNOLOGY PROVIDERS > Innovation New Applications	Data Lake
<b>Mission Wealth</b>	INDIVIDUAL RIA FIRMS > Chief Marketing Officer of the Year	Michelle Winkles
<b>Mitlin Financial</b>	PODCASTS > Investor Focused	Mitlin Money Mindset®
<b>Modelist</b>	ASSET MANAGERS > Goals-based Investing Platforms	Goals-Based Model Portfolios
<b>Modelist</b>	ASSET MANAGERS > Portfolio Construction	Custom Model Construction
<b>Modern Wealth Management</b>	INDIVIDUAL RIA FIRMS > M&A Leader of the Year	Jason Gordo, Co-Founder and President
<b>Moneytree Software</b>	TECHNOLOGY PROVIDERS > Financial Planning	Modernized Platform Enhancements
<b>Morgan Stanley</b>	BROKER–DEALERS: 1,000 Advisors or More > Technology	Generative AI Platform
<b>Morgan Stanley</b>	FAMILY OFFICES > Thought Leadership	Family Legacy and Governance Institute
<b>Morningstar Investment Management (Morningstar Retirement)</b>	INDUSTRY RESEARCH PROVIDERS	U.S. Retirement Outcome Model
<b>Morningstar Investment Management (Morningstar Retirement)</b>	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Convergence > Wealth and Retirement Integration	Personal Finance Builder
<b>Morningstar Wealth</b>	ASSET MANAGERS > Thought Leadership	The Market Minute
<b>Move Health</b>	TECHNOLOGY PROVIDERS > Specialized Planning Applications	Healthcare Planning Solution
<b>MSCI Wealth</b>	TECHNOLOGY PROVIDERS > Innovation New Applications	Similarity Score
<b>MSCI Wealth</b>	TECHNOLOGY PROVIDERS > Portfolio Analytics	MSCI Wealth Manager
<b>MyVest</b>	TECHNOLOGY PROVIDERS > Portfolio Management, Accounting and Performance Reporting	Modern UMA Platform
<b>MyVest</b>	TECHNOLOGY PROVIDERS > Unified (all-in-one) Systems	Tax-Aware Portfolio Management
<b>Nebo Wealth</b>	ASSET MANAGERS > Goals-based Investing Platforms	Enterprise Solutions Platform
<b>Nebo Wealth</b>	ASSET MANAGERS > Portfolio Construction	Goals-Driven Model Selector Program
<b>Nebo Wealth</b>	ASSET MANAGERS > Thought Leadership	Challenging the Overreliance on Risk Scores
<b>NEOS Investments</b>	ASSET MANAGERS > Chief Marketing Officer of the Year	Zachary Csillag
<b>NEOS Investments</b>	ASSET MANAGERS > ETFs	Tax Efficient Income ETFs
<b>NEOS Investments</b>	ASSET MANAGERS > New Product Development	Tax Efficient Income ETFs
<b>Nestimate</b>	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > In-plan Retirement Income - Product or Service	Retirement Income Platform
<b>Nestimate</b>	TECHNOLOGY PROVIDERS > Innovation Platforms	Retirement Income Platform
<b>Net Positive Consortium</b>	CORPORATE SOCIAL RESPONSIBILITY	Net Positive Consortium
<b>New York Life Investments</b>	ASSET MANAGERS > Thought Leadership	Megatrends 2024
<b>New York Life Investments Advisor Advancement Institute</b>	INSURANCE	Succession Planning Research
<b>NewEdge Advisors</b>	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Higher Than \$25 Billion)	Alex Goss
<b>NewEdge Capital Group</b>	ADVISOR SUPPORT PLATFORMS	Bridge Program
<b>NewEdge Wealth</b>	INDIVIDUAL RIA FIRMS > Client Initiatives	Wealth Ascend
<b>Nitrogen</b>	TECHNOLOGY PROVIDERS > Artificial Intelligence > Workflow Automation	AI Statement Capture
<b>Northwestern Mutual</b>	DIVERSITY, EQUITY AND INCLUSION	D&I Development Summit

Nuveen	ASSET MANAGERS > Digital Marketing Campaign of the Year	Benefits 2.0
Nuveen	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > DCIO Providers – Advisor Value Added Programs	nextAdvisor Strategies
Oak Summit Wealth Management	INDIVIDUAL RIA FIRMS > Rising Star of the Year	Michael Randall, Owner/Financial Planner
OnBord	M&A DEAL SUPPORT	OnBord Platform
OneAscent Capital	ASSET MANAGERS > Alternative Investments	Private Markets
OneDigital Investment Advisors	RETIREMENT PLAN SUPPORT AND ADVISOR SERVICES > Corporate Retirement Leader of the Year	Vincent Morris, President
OneVest	TECHNOLOGY PROVIDERS > Client Onboarding/New Account Opening	Digital Onboarding Platform
OneVest	TECHNOLOGY PROVIDERS > Innovation Platforms	Next Best Action Powered by AI
Opto Investments	TECHNOLOGY PROVIDERS > Alternative Investment Platforms	Fund Explorer
Opto Investments	TECHNOLOGY PROVIDERS > Innovation Platforms	Fund Explorer
Orion	PODCASTS > Industry Focused	Standard Deviations
Orion	TAMPs > Model Marketplaces	Model Search and Comparison
Orion	TECHNOLOGY PROVIDERS > Chief Executive Officer of the Year	Natalie Wolfson
Orion	TECHNOLOGY PROVIDERS > Chief Marketing Officer of the Year	Betsy Perez
Orion	TECHNOLOGY PROVIDERS > Direct Indexing	Custom Indexing Proposal and Onboarding Enhancements
Orion	TECHNOLOGY PROVIDERS > Outsourcing Platforms (Wealth as Service)	Outsourced Chief Investment Officer
Orion	TECHNOLOGY PROVIDERS > Portfolio Management, Accounting and Performance Reporting	BeFi-Driven Performance Reporting
Orion	TECHNOLOGY PROVIDERS > Unified (all-in-one) Systems	Connected Tech Ecosystem
Osaic	BROKER–DEALERS > Thought Leadership	Financial Planning Campaign
Osaic	BROKER–DEALERS: 1,000 Advisors or More > Practice Management	Wealth Advisor Academy
Osaic	CORPORATE SOCIAL RESPONSIBILITY	LIFE Financial Literacy Pathways
Osaic	CORPORATE SOCIAL RESPONSIBILITY	Osaic Foundation
Pacific Life	INSURANCE	Registered Index-Linked Annuities
Panoramix	CORPORATE SOCIAL RESPONSIBILITY	Carbon Neutral Program
Panoramix	TECHNOLOGY PROVIDERS > Retirement Income Technology	RMDs Enhancements
Pathstone	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Higher Than \$25 Billion)	Matthew Fleissig
Pathstone	INDIVIDUAL RIA FIRMS > M&A Leader of the Year	Kevin Casey, Managing Director of Corporate Development and Strategy
Pebble Finance	TECHNOLOGY PROVIDERS > Innovation New Applications	Pebble AI
Pebble Finance	TECHNOLOGY PROVIDERS > Portfolio Analytics	Platform Features
PenChecks Trust	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > 401(k) Technology	NextLevel IRA
PenChecks Trust	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > RPA Service	NextLevel IRA
Pension Resource Institute	COMPLIANCE/LAW FIRMS	RolloverAdvantage
Pension Resource Institute	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > 401(k) Technology	RolloverAdvantage
Perigon Wealth Management	INDIVIDUAL RIA FIRMS > Rising Star of the Year	Danny McAuliffe, Wealth Advisor
PGIM DC Solutions	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > DCIO Providers – Advisor Value Added Programs	Advice Engine Retirement Planning Tool
PIMCO	ASSET MANAGERS > Client Experience Initiative	Advisor Forum
Pontera	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > 401(k) Technology	Orion Trading Integration
Pontera	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Convergence > Wealth and Retirement Integration	Orion Trading Integration
Practifi	TECHNOLOGY PROVIDERS > CRM	Advisor Efficiency and Client Engagement
Practifi	TECHNOLOGY PROVIDERS > Thought Leadership	Women’s History Month Spotlight Series
Praxis Solutions	DISRUPTORS > Technology	AI-Driven Due Diligence and Analytics
PreciseFP	TECHNOLOGY PROVIDERS > Client Onboarding/New Account Opening	PreciseFP Onboarding
Principal Asset Management	ASSET MANAGERS > Thought Leadership	Global Market Perspectives
Principal Financial Group	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > RPA Service	Enrollment and Education Toolkit
Private Advisor Group	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Higher Than \$25 Billion)	Frank Smith



<b>Private Advisor Group</b>	INDIVIDUAL RIA FIRMS > Chief Marketing Officer of the Year	Kelly Coulter
<b>Prospera Financial Services</b>	BROKER–DEALERS: Fewer Than 1,000 Advisors > Practice Management	Planning Your Way
<b>Purshe Kaplan Sterling Investments</b>	BROKER–DEALERS > Chief Executive Officer of the Year	Katherine Flouton
<b>Purshe Kaplan Sterling Investments</b>	BROKER–DEALERS > Transition Support	Transition Services
<b>Raymond James</b>	CORPORATE SOCIAL RESPONSIBILITY	Ready for School Program
<b>Raymond James</b>	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > RPA Service	Advisor Fiduciary Solutions
<b>RBC Clearing &amp; Custody</b>	CHIEF TECHNOLOGY OFFICER OF THE YEAR	Noel Stave
<b>RBC Wealth Management</b>	BROKER–DEALERS: 1,000 Advisors or More > Technology	Meeting Preparation Tool
<b>RegVerse</b>	TECHNOLOGY PROVIDERS > Artificial Intelligence > Workflow Automation	Fusion 1
<b>RegVerse</b>	TECHNOLOGY PROVIDERS > Compliance	Fusion 1
<b>Research Affiliates</b>	ASSET MANAGERS > Chief Marketing Officer of the Year	Natalie Grasso
<b>Research Affiliates</b>	ASSET MANAGERS > Digital Marketing Campaign of the Year	NIXT Campaign
<b>Research Affiliates</b>	ASSET MANAGERS > Thought Leadership	Research Affiliates' Deletions Index
<b>Research Affiliates</b>	INDUSTRY RESEARCH PROVIDERS	Interactive Asset Allocation Tool
<b>RFG Advisory</b>	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Lower Than \$25 Billion)	Shannon Spotswood
<b>RFG Advisory</b>	INDIVIDUAL RIA FIRMS > Rising Star of the Year	Jordan Hutchison, VP of Technology and Operations
<b>RIA Growth Catalyst</b>	DISRUPTORS > Technology	AI-Powered Insights
<b>RIA Growth Catalyst</b>	M&A DEAL SUPPORT	AI-Powered Insights Platform
<b>Rowboat Advisors</b>	TECHNOLOGY PROVIDERS > Direct Indexing	UMA Functionality
<b>Sanctuary Wealth</b>	ADVISOR SUPPORT PLATFORMS	Wealth Management Platform
<b>Sanctuary Wealth</b>	INDIVIDUAL RIA FIRMS > Thought Leader of the Year	Mary Ann Bartels, Chief Investment Strategist
<b>Savant Wealth Management</b>	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Higher Than \$25 Billion)	Brent Brodeski
<b>Savant Wealth Management</b>	INDIVIDUAL RIA FIRMS > Rising Star of the Year	Ashley R. Olivas, Financial Advisor
<b>SEI</b>	ASSET MANAGERS > Alternative Investments	SEI Access
<b>SEI</b>	CUSTODIANS > Practice Management	Business Audit
<b>SEI</b>	TECHNOLOGY PROVIDERS > Client Onboarding/New Account Opening	Implement Integrations
<b>SEI</b>	TECHNOLOGY PROVIDERS > Model Marketplaces	Portfolio Evaluator
<b>Seismic</b>	TECHNOLOGY PROVIDERS > Artificial Intelligence > Meeting Support	Seismic for Meetings
<b>Signature Estate &amp; Investment Advisors</b>	BROKER–DEALERS > Transition Support	Signature Estate Securities (SES)
<b>Signature Estate &amp; Investment Advisors</b>	PHILANTHROPY	Signature Fund for Giving
<b>SIGNiX</b>	TECHNOLOGY PROVIDERS > Client Onboarding/New Account Opening	Secure Digital Signatures
<b>Silver Oak Securities</b>	BROKER–DEALERS > Chief Executive Officer of the Year	Billy Hopkins
<b>SimCorp</b>	TECHNOLOGY PROVIDERS > Rebalancing	Axioma WealthVision
<b>Simplify</b>	ASSET MANAGERS > ETFs	Access to Alternatives
<b>SmartAsset</b>	TECHNOLOGY PROVIDERS > Marketing Automation	Advisor Marketing Platform
<b>Smartleaf Asset Management</b>	ASSET MANAGERS > New Product Development	Automated Unified Managed Households
<b>Smartleaf Asset Management</b>	TAMPs > TAMPs	Automated Unified Managed Households
<b>SMARTX Advisory Solutions</b>	TECHNOLOGY PROVIDERS > Model Marketplaces	Managed Investment Products
<b>Snappy Kraken</b>	TECHNOLOGY PROVIDERS > Artificial Intelligence > Marketing and Lead Generation	AI-Powered Lead Capture
<b>Snowden Lane Partners</b>	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Lower Than \$25 Billion)	Rob Mooney
<b>Sora Finance</b>	TECHNOLOGY PROVIDERS > Securities-based Lending	AI-Driven Debt Optimization Enhancements
<b>SS&amp;C Accord</b>	TECHNOLOGY PROVIDERS > Alternative Investment Platforms	Scaling Alternatives
<b>SS&amp;C Black Diamond</b>	ASSET MANAGERS > Goals-based Investing Platforms	Proposal Generation Tool
<b>SS&amp;C Black Diamond</b>	TECHNOLOGY PROVIDERS > Client Portals	Widgetizing the Client Experience
<b>SS&amp;C Black Diamond</b>	TECHNOLOGY PROVIDERS > Portfolio Management, Accounting and Performance Reporting	Managed Account Services

<b>SS&amp;C Black Diamond</b>	TECHNOLOGY PROVIDERS > Portfolio Management, Accounting and Performance Reporting	Intelligent Reporting
<b>SS&amp;C Black Diamond</b>	TECHNOLOGY PROVIDERS > Unified (all-in-one) Systems	Black Diamond Wealth Platform
<b>Stash Wealth</b>	PODCASTS > Investor Focused	Ambitious 30-Somethings
<b>StepStone Private Wealth</b>	ASSET MANAGERS > Chief Executive Officer of the Year	Bob Long
<b>StepStone Private Wealth</b>	ASSET MANAGERS > Alternative Investments	Global Private Credit
<b>StepStone Private Wealth</b>	ASSET MANAGERS > New Product Development	Global Private Credit Access
<b>Steward Partners</b>	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Higher Than \$25 Billion)	Jim Gold
<b>Steward Partners</b>	INDIVIDUAL RIA FIRMS > Chief Marketing Officer of the Year	Greg Banasz
<b>Stratos Wealth Partners</b>	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Lower Than \$25 Billion)	Jeff Concepcion
<b>StreetCred PR</b>	PROFESSIONAL SERVICES FIRMS > Chief Executive Officer of the Year	Jason Lahita
<b>Summit Financial</b>	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Lower Than \$25 Billion)	Stan Gregor
<b>Syntax Data</b>	TECHNOLOGY PROVIDERS > Direct Indexing	Syntax Direct Platform
<b>TaxStatus</b>	TECHNOLOGY PROVIDERS > Specialized Planning Applications	Financial Baseline Report
<b>TCW</b>	ASSET MANAGERS > Chief Executive Officer of the Year	Katie Koch
<b>TCW</b>	ASSET MANAGERS > Fixed Income	Active Fixed Income ETFs
<b>Testimonial iQ</b>	TECHNOLOGY PROVIDERS > Compliance	Compliant Google Reviews
<b>The Alliance for Lifetime Income</b>	INDUSTRY ASSOCIATIONS	Ali: AI-Powered Chatbot
<b>The American College of Financial Services</b>	DISRUPTORS > Industry	Horizons 2025
<b>The American College of Financial Services</b>	INDUSTRY ASSOCIATIONS	Horizons 2025
<b>The American College of Financial Services</b>	PODCASTS > Industry Focused	Shares
<b>The Chartered Alternative Investment Analyst Association</b>	INDUSTRY ASSOCIATIONS	Alternative Investments Report
<b>The Haverford Trust Company</b>	CORPORATE SOCIAL RESPONSIBILITY	Internship Program
<b>The Haverford Trust Company</b>	PODCASTS > Investor Focused	Speaking of Quality
<b>The Oasis Group</b>	INDUSTRY RESEARCH PROVIDERS	Peaks Research and AI Wealthtech Map
<b>The Oasis Group</b>	PROFESSIONAL SERVICES FIRMS > Chief Executive Officer of the Year	John O'Connell
<b>The Pinnacle Group</b>	INSURANCE	RIA Variable Annuity Solutions
<b>TheCarCrowd</b>	ASSET MANAGERS > Alternative Investments	Classic Car Investment Platform
<b>Thornburg Investment Management</b>	CORPORATE SOCIAL RESPONSIBILITY	Power of Partnership
<b>Three Crowns Copywriting and Marketing</b>	MARKETING   PR FIRMS > Client Digital Campaign of the Year	Net Positive Consortium Brand Campaign
<b>TIFIN Give</b>	PHILANTHROPY	Charitable Giving for the Next Generation
<b>Tolerisk</b>	TECHNOLOGY PROVIDERS > Risk Tolerance/Client Profiling	Tolerisk Platform
<b>Touchstone Investments</b>	ASSET MANAGERS > ETFs	Touchstone Dynamic International ETF
<b>TradePMR</b>	CUSTODIANS > Technology	Fusion SYNC
<b>TradePMR</b>	CUSTODIANS > Transition Support	Fusion SYNC
<b>TradePMR</b>	DISRUPTORS > Industry	Robinhood and TradePMR
<b>Triad Partners</b>	PODCASTS > Industry Focused	Do Business. Do Life.
<b>TrueShares</b>	ASSET MANAGERS > ETFs	Laddered Buffer ETF
<b>Trust &amp; Will</b>	ESTATE PLANNING > Technology	Estate Planning Platform
<b>Trust &amp; Will</b>	ESTATE PLANNING > Thought Leadership	Financial Advisor and Estate Planning Research Series
<b>Trust &amp; Will</b>	ESTATE PLANNING > Trusts	Estate Planning Platform
<b>Trust &amp; Will</b>	TECHNOLOGY PROVIDERS > Chief Executive Officer of the Year	Cody Barbo
<b>Turkey Hill Management</b>	M&A DEAL SUPPORT	M&A Advisory Service Without Success Fees
<b>Turkey Hill Management</b>	PROFESSIONAL SERVICES FIRMS > Chief Executive Officer of the Year	Jessica Polito
<b>UBS</b>	BROKER-DEALERS > Thought Leadership	Road to Election Video Series
<b>United Planners Financial Services</b>	BROKER-DEALERS > Chief Executive Officer of the Year	Michael A. Baker

<b>United Planners Financial Services</b>	BROKER–DEALERS > Digital Marketing Campaign of the Year	Yes, It's True Campaign
<b>United Planners Financial Services</b>	BROKER–DEALERS: Fewer Than 1,000 Advisors > Technology	AI-Powered Workflow Automation
<b>UX Wealth Partners</b>	TAMPs > TAMPs	Xperience Platform
<b>VanEck</b>	ASSET MANAGERS > Thought Leadership	Digital Assets Research
<b>Vanilla</b>	ESTATE PLANNING > Advisor Service and Support	Document Abstraction Services
<b>Vanilla</b>	ESTATE PLANNING > Implementation	Vanilla Academy
<b>Vanilla</b>	ESTATE PLANNING > Technology	V/AI Copilot
<b>Vanilla</b>	ESTATE PLANNING > Thought Leadership	The State of Estate Planning Report 2025
<b>Vestmark</b>	TECHNOLOGY PROVIDERS > Portfolio Management, Accounting and Performance Reporting	Vestmark Advisor
<b>Vestwell</b>	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Corporate Retirement Leader of the Year	Aaron Schumm, CEO
<b>Vestwell</b>	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Record Keepers – Retirement Plan Advisor Support	Modern Record-Keeping Platform
<b>Vise Technologies</b>	TECHNOLOGY PROVIDERS > Innovation Platforms	The Vise Platform
<b>VistaShares</b>	ASSET MANAGERS > New Product Development	Actively Managed ETFs
<b>Vocatus</b>	MARKETING   PR FIRMS > Client PR Campaign of the Year	Callan Family Office Campaign
<b>Voyant</b>	ESTATE PLANNING > Trusts	Enhanced Trusts Module
<b>Voyant, Inc.</b>	TECHNOLOGY PROVIDERS > Client Onboarding/New Account Opening	Intelligent Fact Find
<b>Water &amp; Wall</b>	MARKETING   PR FIRMS > Client PR Campaign of the Year	Snowden Lane Campaign
<b>Wealth Enhancement Group</b>	INDIVIDUAL RIA FIRMS > M&A Leader of the Year	Jim Cahn, Chief Strategy Officer
<b>Wealth.com</b>	ESTATE PLANNING > Advisor Service and Support	Attorney Partner Network
<b>Wealth.com</b>	ESTATE PLANNING > Implementation	Family Office Suite
<b>Wealth.com</b>	ESTATE PLANNING > Technology	Scenario Builder
<b>Wealth.com</b>	FAMILY OFFICES > Client Initiative	Family Office Suite
<b>Wealth.com</b>	TECHNOLOGY PROVIDERS > Chief Executive Officer of the Year	Rafael Loureiro
<b>Wealth.com</b>	TECHNOLOGY PROVIDERS > Artificial Intelligence > Workflow Automation	Ester AI
<b>WealthFeed</b>	TECHNOLOGY PROVIDERS > Artificial Intelligence > Marketing and Lead Generation	AI-Powered Organic Growth Platform
<b>Wealthspire Advisors</b>	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Higher Than \$25 Billion)	Mike LaMena
<b>Wells Fargo</b>	BROKER–DEALERS > Thought Leadership	Pillars of Understanding
<b>Wescott Financial Advisory Group</b>	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Lower Than \$25 Billion)	Grant Rawdin
<b>Whealthcare Planning</b>	ESTATE PLANNING > Technology	WhealthChat
<b>Whealthcare Planning</b>	TECHNOLOGY PROVIDERS > Innovation New Applications	WhealthChat
<b>Wilmington Trust</b>	ESTATE PLANNING > Thought Leadership	Emerald GEMs Podcast
<b>WisdomTree</b>	ASSET MANAGERS > Chief Executive Officer of the Year	Jonathan Steinberg
<b>WisdomTree</b>	ASSET MANAGERS > Chief Marketing Officer of the Year	Luba Spear
<b>WisdomTree</b>	PODCASTS > Industry Focused	The Next Big Thing
<b>XY Planning Network</b>	ADVISOR SUPPORT PLATFORMS	Sapphire
<b>XY Planning Network</b>	PODCASTS > Industry Focused	Behind the Advisor
<b>YCharts</b>	TECHNOLOGY PROVIDERS > Artificial Intelligence > Workflow Automation	AI Chat
<b>Zenith Wealth Partners</b>	DIVERSITY, EQUITY AND INCLUSION	Internship Program
<b>Zephyr</b>	TECHNOLOGY PROVIDERS > Account Aggregation	Performance in Micro Apps
<b>Zephyr</b>	TECHNOLOGY PROVIDERS > Digital Marketing Campaign of the Year	PSN eBook Series
<b>Zephyr</b>	TECHNOLOGY PROVIDERS > Thought Leadership	Women in Investing
<b>Zeplyn</b>	DISRUPTORS > Technology	Agentic AI Assistant
<b>Zeplyn</b>	TECHNOLOGY PROVIDERS > Chief Executive Officer of the Year	Era Jain
<b>Zeplyn</b>	TECHNOLOGY PROVIDERS > Chief Technology Officer of the Year	Divam Jain
<b>Zeplyn</b>	TECHNOLOGY PROVIDERS > Artificial Intelligence > Meeting Support	Agentic AI Assistant

Zocks	DISRUPTORS > Technology	Client Intelligence
Zocks	TECHNOLOGY PROVIDERS > Artificial Intelligence > Meeting Support	Privacy-First AI Platform
Zoe Financial	TAMPs > TAMPs	NextGen TAMP for Personalized Advice

