

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 Enhancements
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
AITi Tiedemann Global	FAMILY OFFICES > Thought Leadership	Operational Excellence Report
AITi 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

Anchor Bay Capital	INDIVIDUAL RIA FIRMS > Rising Star of the Year	Blake Pinyan, Senior Financial Planner and Tax Manager
Andes Risk	TECHNOLOGY PROVIDERS > Risk Tolerance/Client Profiling	Advanced Risk and Behavioral Profiling
Andes Risk	TECHNOLOGY PROVIDERS > Thought Leadership	The NextGen Risk Framework eBook
Apex Fintech Solutions	CUSTODIANS > Alternative Asset	Apex Alts
Aquilance	TECHNOLOGY PROVIDERS > Outsourcing Platforms (Wealth as Service)	Aquilance: Wealth-As-A-Service
Archive Intel	TECHNOLOGY PROVIDERS > Artificial Intelligence > Workflow Automation	Compliance AI Agent
Archive Intel	TECHNOLOGY PROVIDERS > Compliance	AI-Powered Archiving Program
Ares Wealth Management Solutions	ASSET MANAGERS > Alternative Investments	Private Markets
ARQA	DISRUPTORS > Technology	AI-Powered Workflow
Ascensus	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Record Keepers – Corporate Leader of the Year	David Musto, Chair and CEO
Ascensus	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Record Keepers – Retirement Plan Advisor Support	Plug in - All Things PEP
Aspiriant	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Lower Than \$25 Billion)	Rob Francais
Asset-Map	TECHNOLOGY PROVIDERS > Financial Planning	Relationship Maps
Asset-Map	TECHNOLOGY PROVIDERS > Specialized Planning Applications	Relationship Maps
AssetLink	DISRUPTORS > Technology	Relationship Intelligence
AssetMark	TAMPs > TAMPs	Investment Platform
Avantax Wealth Management	BROKER–DEALERS: 1,000 Advisors or More > Practice Management	Peer Mentorship Program
Axos Advisor Services	TECHNOLOGY PROVIDERS > Cash Optimization	Enhanced Cash Management Integration
Axos Advisor Services	TECHNOLOGY PROVIDERS > Securities-based Lending	SBLOC for Advisors and Clients
Axtella	BROKER–DEALERS > Digital Marketing Campaign of the Year	Target City Campaign
Axtella	BROKER–DEALERS > Service	Tech Talks Webinar Series
Ballast Rock Private Wealth	INDIVIDUAL RIA FIRMS > Thought Leader of the Year	Jim Carroll, Senior Wealth Advisor and Portfolio Manager
Bank of America Private Bank	ASSET MANAGERS > Client Experience Initiative	Unified Mobile App
Bank of America Private Bank	ESTATE PLANNING > Trusts	Trust Optimization
Beacon Pointe Advisors	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Higher Than \$25 Billion)	Shannon Eusey
Beacon Pointe Advisors	INDIVIDUAL RIA FIRMS > Chief Marketing Officer of the Year	Allison Warner
Bento Engine	TECHNOLOGY PROVIDERS > Business Support Systems	Bento Content Portal
Bernstein Private Wealth Management	BROKER–DEALERS > Digital Marketing Campaign of the Year	Dessert Explainer Series
Bernstein Private Wealth Management	BROKER–DEALERS > Service	Ultra-High Net Worth Platform
BetaNXT	TECHNOLOGY PROVIDERS > Data Lakes/Warehouses	DataXChange
Betterment Advisor Solutions	TECHNOLOGY PROVIDERS > Retirement Income Technology	Digital Solo 401(k)s
BidMoni	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > 401(k) Technology	Predictive Plan Design
BlackRock	ASSET MANAGERS > Portfolio Construction	Public Private Portfolios
BNY Pershing	CUSTODIANS > Practice Management	Next Leaders Cohort Program
BNY Wealth	FAMILY OFFICES > Thought Leadership	Family Office Investment Insights
Bogart Wealth	INDIVIDUAL RIA FIRMS > Thought Leader of the Year	James Bogart, Founder and CEO
BondBloxx	ASSET MANAGERS > ETFs	Private Credit ETF
BondBloxx	ASSET MANAGERS > Fixed Income	Private Credit ETF
Boyer Financial Group	INDIVIDUAL RIA FIRMS > Thought Leader of the Year	Drew Boyer, Founder and CEO
bQuest	DISRUPTORS > Industry	Aging Care Coordination Platform
bQuest	TECHNOLOGY PROVIDERS > Specialized Planning Applications	Aging Care Coordination Platform
Brighton Jones	CORPORATE SOCIAL RESPONSIBILITY	B Corp Designation
Brighton Jones	PHILANTHROPY	Richer Life Foundation
Broadridge Financial Solutions	TECHNOLOGY PROVIDERS > Digital Marketing Campaign of the Year	Blueprint for Brilliance
Brooklyn Investment Group	TECHNOLOGY PROVIDERS > Direct Indexing	Long/Short Tax Management Capabilities
Bryn Mawr Trust	ESTATE PLANNING > Technology	Tax and Retirement Planning Tools

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

Craft & Capital	MARKETING PR FIRMS > Client PR Campaign of the Year	BondBloxx Campaign
Cresset	INDIVIDUAL RIA FIRMS > Chief Technology Officer of the Year	Paul Algreen
d1g1t Inc.	TECHNOLOGY PROVIDERS > Rebalancing	UMA Trading Framework
Daylight	PHILANTHROPY	Certified Impact Philanthropy Advisor Program
DealRoom	M&A DEAL SUPPORT	DealRoom AI
Digital Assets Council of Financial Professionals	DISRUPTORS > Industry	Blockchain and Digital Assets Certification
Digital Assets Council of Financial Professionals	INDUSTRY ASSOCIATIONS	Blockchain and Digital Assets Certification
Docupace	TECHNOLOGY PROVIDERS > Chief Marketing Officer of the Year	Ryan George
Docupace	TECHNOLOGY PROVIDERS > Business Support Systems	The Docupace Platform
Don't Retire... Graduate!	PODCASTS > Investor Focused	Don't Retire... Graduate!
Dunham & Associates Investment Counsel	ASSET MANAGERS > Thought Leadership	Retirement Planning White Paper
Dynasty Financial Partners	TAMPs > Model Marketplaces	Model Select
Eaton Vance's U.S. Charitable Gift Trust	ASSET MANAGERS > New Product Development	Charitable Gift Trust
Eaton Vance's U.S. Charitable Gift Trust	ESTATE PLANNING > Advisor Service and Support	Estate Planning Tool
Eaton Vance's U.S. Charitable Gift Trust	ESTATE PLANNING > Implementation	Estate Planning Tool
ECHELON Partners	M&A DEAL SUPPORT	RIA M&A Deal Report
Egnyte	TECHNOLOGY PROVIDERS > Business Support Systems	Cloud Collaboration Solution
Elevation Point	M&A DEAL SUPPORT	Minority Stake RIA Growth Partnership
Ellevest	PROFESSIONAL SERVICES FIRMS > Chief Executive Officer of the Year	Michelle Odom
Emigrant Partners	PODCASTS > Industry Focused	RIA+
eMoney Advisor	TECHNOLOGY PROVIDERS > Account Aggregation	eMoney Enhancements
eMoney Advisor	TECHNOLOGY PROVIDERS > Client Portals	Premium Client Portal
eMoney Advisor	TECHNOLOGY PROVIDERS > Financial Planning	Needs Analysis
EncorEstate Plans	ESTATE PLANNING > Implementation	Standalone Deed Service
EncorEstate Plans	ESTATE PLANNING > Trusts	Streamlined Trust Digitization and Restatement
Envestnet	TAMPs > TAMPs	Wealth Management Platform
Envestnet	TECHNOLOGY PROVIDERS > CRM	Schwab Advisor Services Integration
Envestnet	TECHNOLOGY PROVIDERS > Direct Indexing	Customizable Options Strategy
Envestnet	TECHNOLOGY PROVIDERS > Unified (all-in-one) Systems	Wealth Management Ecosystem Enhancements
F/m Investments	ASSET MANAGERS > Chief Executive Officer of the Year	Alex Morris
Falcon Wealth Planning	INDIVIDUAL RIA FIRMS > Rising Star of the Year	Zackary Royce, Regional Director
Family Office Real Estate Institute	FAMILY OFFICES > Thought Leadership	Real Estate Education
Farther	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Lower Than \$25 Billion)	Taylor Matthews
Farther	INDIVIDUAL RIA FIRMS > Chief Technology Officer of the Year	Brad Genser
Ficomm Partners	MARKETING PR FIRMS > Client Digital Campaign of the Year	Digital-First Advisors Campaign for Allworth
Ficomm Partners	PODCASTS > Industry Focused	Growth Leaders of Wealth Management
Ficomm Partners	PROFESSIONAL SERVICES FIRMS > Chief Executive Officer of the Year	Megan Carpenter
Fidelis Capital Partners	ASSET MANAGERS > Fixed Income	Fixed Income SMA Strategy
Fidelity Investments	ASSET MANAGERS > Alternative Investments	Alternative Investments
Fidelity Investments	ASSET MANAGERS > New Product Development	Digital Assets Portfolios
Fidelity Investments	CUSTODIANS > Practice Management	Organic Growth Strategy
Fidelity Investments	PHILANTHROPY	Philanthropic Education for Advisors
Fiduciary Trust Company	CUSTODIANS > Transition Support	Custody Transitions
Fiduciary Trust Company	ESTATE PLANNING > Advisor Service and Support	Estate Planning Education
Fiduciary Trust of New England	ESTATE PLANNING > Trusts	Awareness and Engagement for NH Trusts
Financial Finesse	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Convergence > Wealth and Retirement Integration	Financial Coaching

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

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

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

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

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

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

