

WealthManagement.com 2025 Industry Awards Winners and Honorees by Category

Award Category	Company Name	Nomination Name
ADVISOR SUPPORT PLATFORMS		
WINNER	Advisory Services Network	Small Advisor Support
	Affiliated Advisors - WINNER	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 - WINNER	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 - WINNER	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 - WINNER	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 - WINNER	Advisor Forum

<b>Digital Marketing Campaign of the Year</b>	Meeder Investment Management	National Accounts Campaign
	Nuveen	Benefits 2.0
	<b>Research Affiliates - <i>WINNER</i></b>	<b>NIXT Campaign</b>
<b>ETFs</b>	BondBloxx	Private Credit ETF
	<b>Calamos Investments - <i>WINNER</i></b>	<b>Structured Protection ETFs</b>
	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
<b>Fixed Income</b>	<b>BondBloxx - <i>WINNER</i></b>	<b>Private Credit ETF</b>
	Fidelis Capital Partners	Fixed Income SMA Strategy
	TCW	Active Fixed Income ETFs
<b>Goals-based Investment Platforms</b>	Modelist	Goals-Based Model Portfolios
	<b>Nebo Wealth - <i>WINNER</i></b>	<b>Enterprise Solutions Platform</b>
	SS&C Black Diamond	Proposal Generation Tool
<b>New Product Development</b>	CAZ Investments	Alternative Investments Registered Fund
	Eaton Vance's U.S. Charitable Gift Trust	Charitable Gift Trust
	<b>Fidelity Investments - <i>WINNER</i></b>	<b>Digital Assets Portfolios</b>
	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
<b>Portfolio Construction</b>	<b>BlackRock - <i>WINNER</i></b>	<b>Public Private Portfolios</b>
	Kestra Investment Management	Portfolio Solutions
	Modelist	Custom Model Construction
	Nebo Wealth	Goals-Driven Model Selector Program
<b>Thought Leadership</b>	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
	<b>Nebo Wealth - <i>WINNER</i></b>	<b>Challenging the Overreliance on Risk Scores</b>

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

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

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
	<b>TradePMR - WINNER</b>	<b>Robinhood and TradePMR</b>
Technology	11thEstate   11th.com	Fund Recovery
	Alaris Acquisitions	M&A Matchmaking
	<b>ARQA - WINNER</b>	<b>AI-Powered Workflow</b>
	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		
	<b>Cambridge Investment Research - WINNER</b>	<b>Community of Women Program</b>
	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
	<b>Vanilla - WINNER</b>	<b>Document Abstraction Services</b>
	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
	<b>Wealth.com - WINNER</b>	<b>Family Office Suite</b>
Technology	Bryn Mawr Trust	Tax and Retirement Planning Tools
	FP Alpha	Estate Planning Insights
	Trust & Will	Estate Planning Platform
	Vanilla	V/AI Copilot
	<b>Wealth.com - WINNER</b>	<b>Scenario Builder</b>
	Whealthcare Planning	WhealthChat
Thought Leadership	Bryn Mawr Trust	Digital Asset Management

	Trust & Will	Financial Advisor and Estate Planning Research Series
	<b>Vanilla - <i>WINNER</i></b>	<b>The State of Estate Planning Report 2025</b>
	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
	<b>Trust &amp; Will - <i>WINNER</i></b>	<b>Estate Planning Platform</b>
	Voyant	Enhanced Trusts Module
<b>FAMILY OFFICES</b>		
Client Initiative	<b>Callan Family Office - <i>WINNER</i></b>	<b>Tax Overlay Program</b>
	Key Family Wealth	Family Office Framework
	leafplanner	Family Facing Platform
	Linscomb Wealth	Family Office Services
	Wealth.com	Family Office Suite
Thought Leadership	<b>AITi Tiedemann Global - <i>WINNER</i></b>	<b>Operational Excellence Report</b>
	BNY Wealth	Family Office Investment Insights
	Family Office Real Estate Institute	Real Estate Education
	Morgan Stanley	Family Legacy and Governance Institute
<b>INDIVIDUAL RIA FIRM LEADERS</b>		
Chief Executive Officer of the Year (AUM Higher Than \$25B)	<b>Beacon Pointe Advisors - <i>WINNER</i></b>	<b>Shannon Eusey</b>
	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
	<b>RFG Advisory - <i>WINNER</i></b>	<b>Shannon Spotswood</b>
	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
	<b>Mission Wealth - WINNER</b>	<b>Michelle Winkles</b>
	Private Advisor Group	Kelly Coulter
	Steward Partners	Greg Banasz
Chief Technology Officer of the Year	Callan Family Office	Dan Burke
	<b>Cresset - WINNER</b>	<b>Paul Algreen</b>
	Farther	Brad Genser
Client Initiatives	Callan Family Office	Tax Overlay Program
	Choreo	Tax Advantage™ Solution
	<b>Mercer Advisors - WINNER</b>	<b>Advisor Matching Tool</b>
	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
		<b>Claire O'Keefe, Partner and Head of Partner Development</b>
	<b>Cerity Partners - WINNER</b>	
	Modern Wealth Management	Jason Gordo, Co-Founder and President
		Kevin Casey, Managing Director of Corporate Development and Strategy
	Pathstone	
	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
	intellicients	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
	<b>Integrated Partners - <i>WINNER</i></b>	<b>Paul Saganey, CEO and Founder</b>
	Mercer Advisors	Don Calcagni, Chief Investment Officer
	Sanctuary Wealth	Mary Ann Bartels, Chief Investment Strategist
<b>INDUSTRY ASSOCIATIONS</b>		
	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
	<b>The American College of Financial Services - <i>WINNER</i></b>	<b>Horizons 2025</b>
	The Chartered Alternative Investment Analyst Association	Alternative Investments Report
<b>INDUSTRY RESEARCH PROVIDERS</b>		
	Certified Financial Planner Board of Standards	Quarterly Consumer Research
	<b>Morningstar Investment Management (Morningstar Retirement) - <i>WINNER</i></b>	<b>U.S. Retirement Outcome Model</b>
	Research Affiliates	Interactive Asset Allocation Tool
	The Oasis Group	Peaks Research and AI Wealthtech Map
<b>INSURANCE</b>		
	Halo Investing	Advisor Insurance Desk
	<b>Holistiplan - <i>WINNER</i></b>	<b>Personal Risk Reviews</b>
	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
<b>M&amp;A DEAL SUPPORT</b>		
	Alaris Acquisitions	AI-Driven M&A Matchmaking
	DealRoom	DealRoom AI
	<b>ECHELON Partners - <i>WINNER</i></b>	<b>RIA M&amp;A Deal Report</b>
	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
<b>MARKETING   PR FIRMS</b>		
<b>Digital Campaign of the Year</b>	<b>Ficomm Partners - <i>WINNER</i></b>	<b>Digital-First Advisors Campaign for Allworth</b>
	Three Crowns Copywriting and Marketing	Net Positive Consortium Brand Campaign



<b>PR Campaign of the Year</b>	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
	<b>Vocatus - WINNER</b>	<b>Callan Family Office Campaign</b>
	Water & Wall	Snowden Lane Campaign
<b>PHILANTHROPY</b>		
	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
	<b>Foundation Source - WINNER</b>	<b>Leveraging PhilTech</b>
	GiveTeam	Scalable Philanthropic Advice
	Signature Estate & Investment Advisors	Signature Fund for Giving
	TIFIN Give	Charitable Giving for the Next Generation
<b>PODCASTS</b>		
<b>Industry Focused</b>	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
	<b>Orion - WINNER</b>	<b>Standard Deviations</b>
	The American College of Financial Services	Shares
	Triad Partners	Do Business. Do Life.
	WisdomTree	The Next Big Thing
	XY Planning Network	Behind the Advisor
<b>Investor Focused</b>	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®
	<b>Stash Wealth - WINNER</b>	<b>Ambitious 30-Somethings</b>
	The Haverford Trust Company	Speaking of Quality
<b>PROFESSIONAL SERVICES FIRMS</b>		
<b>Chief Executive Officer of the Year</b>	Ellevest	Michelle Odom
	<b>Ficomm Partners - WINNER</b>	<b>Megan Carpenter</b>
	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
<b>RETIREMENT PLAN SUPPORT AND ADVISOR SERVICES</b>		
<b>401(k)Technology</b>	BidMoni	Predictive Plan Design
	<b>PenChecks Trust - WINNER</b>	<b>NextLevel IRA</b>
	Pension Resource Institute	RolloverAdvantage
	Pontera	Orion Trading Integration
<b>Convergence &gt; Wealth and Retirement Integration</b>	Absolute Capital Management	Held-Away Account Management
	<b>Financial Finesse - WINNER</b>	<b>Financial Coaching</b>
	Future Capital	Wealth and Retirement Come Together
	Morningstar Investment Management (Morningstar Retirement)	Personal Finance Builder
	Pontera	Orion Trading Integration
<b>Corporate Retirement Leader of the Year</b>	Ascensus	David Musto, Chair and CEO
	<b>OneDigital Investment Advisors - WINNER</b>	<b>Vincent Morris, President</b>
	Vestwell	Modern Record-Keeping Platform
<b>DCIO Providers &gt; Advisor Value Added Programs</b>	Franklin Templeton	ACES Program
	<b>Nuveen - WINNER</b>	<b>nextAdvisor Strategies</b>
	PGIM DC Solutions	Advice Engine Retirement Planning Tool
<b>In-plan Retirement Income - Product or Service</b>	401(k) Annuity Hub	Annuities in 401(k)s Market Intelligence Tool
	Future Capital	Wealth and Retirement Come Together
	<b>Nestimate - WINNER</b>	<b>Retirement Income Platform</b>
<b>Record Keepers &gt; Retirement Plan Advisor Support</b>	401GO	Advisor Partner Portal
	Ascensus	Plug in - All Things PEP
	Manulife John Hancock	FutureStep
	<b>Vestwell - WINNER</b>	<b>Aaron Schumm, CEO</b>
<b>RPA Service</b>	Cambridge Investment Research	RPA Program
	PenChecks Trust	NextLevel IRA
	Principal Financial Group	Enrollment and Education Toolkit
	<b>Raymond James - WINNER</b>	<b>Advisor Fiduciary Solutions</b>
<b>TAMPs</b>		

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

	Nitrogen	AI Statement Capture
	RegVerse	Fusion 1
	Wealth.com	Ester AI
	<b>YCharts - WINNER</b>	<b>AI Chat</b>
<b>Business Support Systems</b>	AdvicePay	AdvicePay Business Support
	<b>Bento Engine - WINNER</b>	<b>Bento Content Portal</b>
	CAIS	AMP Enterprise Solution
	CogniCor	Home Office Copilot
	Docupace	The Docupace Platform
	Egnyte	Cloud Collaboration Solution
<b>Cash Optimization</b>	Axos Advisor Services	Enhanced Cash Management Integration
	<b>Flourish - WINNER</b>	<b>Flourish Cash</b>
	IMTC	Fixed Income Platform
<b>Chief Executive Officer of the Year</b>	Advyzon	Hailin Li
	Alles Technology	Maxwell Alles
	Catchlight	Wilbur Swan
	Conquest Planning	Mark Evans
	iCapital	Lawrence Calcano
	<b>Jump - WINNER</b>	<b>Parker Ence</b>
	Orion	Natalie Wolfsen
	Trust & Will	Cody Barbo
	Wealth.com	Rafael Loureiro
	Zeplyn	Era Jain
<b>Chief Marketing Officer of the Year</b>	CAIS	Alex Cavalieri
	Docupace	Ryan George
	<b>FMG Suite - WINNER</b>	<b>Susan Theder</b>
	Holistiplan	Laura Beaulieu
	Orion	Betsy Perez
<b>Chief Technology Officer of the Year</b>	<b>Addepar - WINNER</b>	<b>Bob Pisani</b>
	CAIS	Kan Kotecha
	Holistiplan	Scott Pittman
	Jump	Adam Kirk
	Zeplyn	Divam Jain
<b>Client Onboarding / New Account Opening</b>	<b>Advisor360° - WINNER</b>	<b>Next Generation Bulk Onboarding</b>

	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
	<b>Fynancial - WINNER</b>	<b>Branded Client Portal</b>
	SS&C Black Diamond	Widgetizing the Client Experience
Compliance	Advisor360°	Advisors and Political Contributions
	<b>Amplify Reviews - WINNER</b>	<b>Compliant Testimonial Platform</b>
	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
	<b>Practifi - WINNER</b>	<b>Advisor Efficiency and Client Engagement</b>
Data Lakes/Warehouses	BetaNXT	DataXChange
	<b>Invent - WINNER</b>	<b>Data LakeHouse</b>
	Milemarker	Data Cloud
Digital Marketing Campaign of the Year	AdvicePay	AdvicePay Showcase
	Amplify Reviews	Blended Testimonial Strategy
	<b>Broadridge Financial Solutions - WINNER</b>	<b>Blueprint for Brilliance</b>
	CAIS	Mercer Survey
	Holistiplan	Tax Summit
	Zephyr	PSN eBook Series
Direct Indexing	<b>Alpathena - WINNER</b>	<b>Direct Indexing Platform</b>
	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
<b>Financial Planning</b>	Asset-Map	Relationship Maps
	<b>Conquest Planning - WINNER</b>	<b>AI-Driven Innovation</b>
	eMoney Advisor	Needs Analysis
	Moneytree Software	Modernized Platform Enhancements
<b>Innovation New Applications</b>	Advisor360°	Advisors and Political Contributions
	Alaris Acquisitions	AI-Driven M&A Matchmaking
	Idea Decanter	FinKit
	<b>Milemarker - WINNER</b>	<b>Data Lake</b>
	MSCI Wealth	Similarity Score
	Pebble Finance	Pebble AI
	Whealthcare Planning	WhealthChat
<b>Innovation Platforms</b>	Catchlight	Lead Routing Decision Support Model
	GeoWealth	Public-Private UMAs
	<b>Halo Investing - WINNER</b>	<b>Structured Notes Analysis</b>
	Nestimate	Retirement Income Platform
	OneVest	Next Best Action Powered by AI
	Opto Investments	Fund Explorer
	Vise Technologies	The Vise Platform
<b>Marketing Automation</b>	CION Investments	Advisor I/O
	<b>FMG Suite - WINNER</b>	<b>From 7 to 50 Automations</b>
	Hummingbird	LinkedIn Automation Platform
	SmartAsset	Advisor Marketing Platform
<b>Model Marketplaces</b>	Advyzon Investment Management	Nucleus Model Marketplace
	Halo Investing	Protective Investment Strategies
	SEI	Portfolio Evaluator
	<b>SMArtX Advisory Solutions - WINNER</b>	<b>Managed Investment Products</b>
<b>Outsourcing Platforms (Wealth as Service)</b>	Aquilance	Aquilance: Bill Payment as a Service
	<b>Invent - WINNER</b>	<b>Invent Store</b>
	Orion	Outsourced Chief Investment Officer
<b>Portfolio Analytics</b>	FINIAT	Intelligent Insights
	<b>Kwanti - WINNER</b>	<b>Risk Profiling Platform</b>
	MSCI Wealth	MSCI Wealth Manager

	Pebble Finance	Platform Features
Portfolio Management, Accounting and Performance Reporting	InvestSuite	StoryTeller
	MyVest	Modern UMA Platform
	Orion - <b>WINNER</b>	BeFi-Driven Performance Reporting
	SS&C Black Diamond	Managed Account Services
	SS&C Black Diamond	Intelligent Reporting
	Vestmark	Vestmark Advisor
Rebalancing	Advyzon - <b>WINNER</b>	Quantum Rebalancer
	d1g1t Inc.	UMA Trading Framework
	InvestCloud	Personalized Rebalancing and Tax Optimization Tools
	RedBlack	Compliance and Tax Management Features
	SimCorp	Axioma WealthVision
Retirement Income Technology	Betterment Advisor Solutions	Digital Solo 401(k)s
	Income Lab	Annuity Planning and Enhanced Tax Features
	Panoramix - <b>WINNER</b>	RMDs Enhancements
Risk Tolerance / Client Profiling	Andes Risk - <b>WINNER</b>	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 - <b>WINNER</b>	GS Select Transitions
	Sora Finance	AI-Driven Debt Optimization Enhancements
Specialized Planning Applications	Asset-Map	Relationship Maps
	bQuest - <b>WINNER</b>	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 - <b>WINNER</b>	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 - <i>WINNER</i>	Black Diamond Wealth Platform

