

Wealth Management Industry Awards 2026 Finalists and Honorees by Company Name

Name of Company	Award Category	Nomination Name
401(k) Marketing	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Advisor Support: Service Providers	Retirement Plan Growth Platform
401GO	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > 401(k) Technology	GoConnect
Addepar	TECHNOLOGY PROVIDERS > Chief Technology Officer of the Year	Bob Pisani
Addepar	TECHNOLOGY PROVIDERS > Innovation Platforms	Addison AI-Native Layer
Advice.ai	DISRUPTORS > Technology	Advice.ai Platform Launch
AdvicePay	TECHNOLOGY PROVIDERS > Chief Marketing Officer of the Year	Shannon Beck
AdvicePay	TECHNOLOGY PROVIDERS > Chief Technology Officer of the Year	Juniper Emnett
AdvicePay	TECHNOLOGY PROVIDERS > Compliance	Compliance Guardrails
AdvicePay	TECHNOLOGY PROVIDERS > Digital Marketing Campaign of the Year	Fee-for-service Trends Campaign
Advisor360°	TECHNOLOGY PROVIDERS > Advisor Intelligence Platforms	Practice Intelligence
Advisors Excel	PODCASTS > Industry Focused	The Business of Advice Podcast
AdvizorPro	TECHNOLOGY PROVIDERS > Artificial Intelligence > Marketing and Lead Generation	AI Lead Generation Platform
Advyzon	TECHNOLOGY PROVIDERS > Chief Marketing Officer of the Year	Samantha Schwimmer
Advyzon	TECHNOLOGY PROVIDERS > CRM	CRM Workflows
Advyzon	TECHNOLOGY PROVIDERS > Digital Marketing Campaign of the Year	Morningstar Office Transition Campaign
Advyzon	TECHNOLOGY PROVIDERS > Innovation Platforms	Next-Gen AI Operating System
Advyzon	TECHNOLOGY PROVIDERS > Unified (all-in-one) Systems	All-Powered WealthTech Platform
Advyzon Investment Management	TAMPs	Sphere Platform and Nucleus Model Marketplace
Advyzon Investment Management	TECHNOLOGY PROVIDERS > Model Marketplaces	Sphere Platform and Nucleus Model Marketplace
Affiliated Advisors	INDEPENDENT, INTEGRATED GROWTH PLATFORMS	Equity Uplift Program
Aidentified	TECHNOLOGY PROVIDERS > Artificial Intelligence > Marketing and Lead Generation	AI-Driven Wealth Prospecting and Lead Generation Platform
Alaris Acquisitions	M & A DEAL SUPPORT > Industry	AI Business Support System
Alles Technology	TECHNOLOGY PROVIDERS > Cyber Security	Risk Insights Assessment
Alles Technology	TECHNOLOGY PROVIDERS > Thought Leadership	Cybersecurity White Papers
AllianceBernstein	ASSET MANAGERS > Client Experience Initiative	SMA Service Center
AllianceBernstein	ASSET MANAGERS > Digital Marketing Campaign of the Year	Fixed Income ETF Campaign
AllianceBernstein	ASSET MANAGERS > Direct Indexing	Balanced Direct Index Portfolio

Allocate	TECHNOLOGY PROVIDERS > Alternative Investment Platforms	Private Markets Platform
Allspring Global Investments	ASSET MANAGERS > Thought Leadership	Tax Alpha and Optimization
AlphaCore Wealth Advisory	INDIVIDUAL RIA FIRMS > Chief Operations Officer of the Year	Brian Habas
Alphathena	TECHNOLOGY PROVIDERS > Direct Indexing	Agentic Direct Indexing Platform
Alphathena	TECHNOLOGY PROVIDERS > Thought Leadership	Agentic AI Portfolio Management White Paper
AlTi Tiedemann Global	FAMILY OFFICES > Thought Leadership	Family Office Operational Excellence Report
AlTi Tiedemann Global	INDIVIDUAL RIA FIRMS > Chief Technology Officer of the Year	Phillip Dundas
Alto	CUSTODIANS > Alternative Asset	Pre-IPO Investments
Altruist	CUSTODIANS > Technology	AI-Powered Intelligence Engine
Altruist	DISRUPTORS > Technology	Hazel
Altruist	TECHNOLOGY PROVIDERS > Chief Executive Officer of the Year	Jason Wenk
Altruist	TECHNOLOGY PROVIDERS > Direct Indexing	Personalized Indexing
Amplify Technology	TECHNOLOGY PROVIDERS > Chief Technology Officer of the Year	David Hatfield
Amplify Technology	TECHNOLOGY PROVIDERS > Data Lakes/Warehouses	AI-Native Data Lake
Apex Fintech Solutions	CUSTODIANS > Technology	AscendOS
Apollo Global Management	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Advisor Support: Service Providers	Private Markets DC Advisor Education Program
Apollon Wealth Management	INDIVIDUAL RIA FIRMS > Chief Compliance Officer of the Year	Mike Herman
april	TECHNOLOGY PROVIDERS > Specialized Planning Applications	Integrated Tax Platform
Arch	TECHNOLOGY PROVIDERS > Alternative Investment Platforms	Contextualized Insights and Premium Investor Experiences
Archive Intel	TECHNOLOGY PROVIDERS > Compliance	AI Powered Marketing Compliance
Aris Investing	ASSET MANAGERS > Direct Indexing	DI Assist
ARQA	TECHNOLOGY PROVIDERS > Chief Executive Officer of the Year	Haik Sahakyan
ARQA	TECHNOLOGY PROVIDERS > Document Management	AI-Powered Data Extraction
Arusha Wealth	INDIVIDUAL RIA FIRMS > Rising Star of the Year	Imade Iyamu, Founder
Ascensus	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Corporate Leader of the Year	Nick Good, CEO
Ascensus	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Advisor Support: Recordkeepers	Advisor Central
Ashton Thomas Private Wealth	INDIVIDUAL RIA FIRMS > Rising Star of the Year	Nico de la Vara, Wealth Advisor
Ashton Thomas Private Wealth	INDIVIDUAL RIA FIRMS > Thought Leader of the Year	Cary Carbonaro, Managing Wealth Partner
Aspiriant	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Lower Than \$25 Billion)	Rob Francais
Asset-Map	ESTATE PLANNING > Technology	Relationship Map Enhancements
Asset-Map	TECHNOLOGY PROVIDERS > Partnership Development Executive of the Year	Alison Susko, Asset-Map's Partnership Powerbroker
Asset-Map	TECHNOLOGY PROVIDERS > Thought Leadership	Advice Engagement Event
AssetMark	ASSET MANAGERS > Thought Leadership	Volatility Resources Team

AssetMark	ESTATE PLANNING > Advisor Service and Support	Advanced Planning Program
AssetMark	TECHNOLOGY PROVIDERS > Digital Marketing Campaign of the Year	Private Markets Unlocked Campaign
AssetMark	TECHNOLOGY PROVIDERS > Unified (all-in-one) Systems	Public-private UMA
Auria by Advyzon	DISRUPTORS > Technology	AuRIA
Auria by Advyzon	FAMILY OFFICES > Client Initiative	AuRIA
Axtella	INSTITUTIONAL CHIEF MARKETING OFFICER OF THE YEAR	Maria Bethel
Bank of America Private Bank	PHILANTHROPY	Philanthropy Study
Banrion Capital Management	PODCASTS > Investor Focused	Alternative Investments Education Podcast
Beacon Bridge Wealth Partners	INDIVIDUAL RIA FIRMS > Client Initiatives	Total Wellness Program
Beacon Pointe Advisors	INDIVIDUAL RIA FIRMS > M&A Leader of the Year	Matthew Cooper, President
Berkshire Global Advisors	M & A DEAL SUPPORT > Industry	Wealth Management M&A Report
Bernstein Private Wealth Management	BROKER-DEALERS > Digital Marketing Campaign of the Year	Lead Generation Campaign
BetaNXT	TECHNOLOGY PROVIDERS > Data Lakes/Warehouses	DataXChange
Betterment Advisor Solutions	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Convergence > Wealth and Retirement Integration	Bridging the Gap
Betterment Advisor Solutions	TECHNOLOGY PROVIDERS > Thought Leadership	Client Segmentation Playbook
BFG Financial Advisors	INDIVIDUAL RIA FIRMS > Rising Star of the Year	Yanni Niebuhr, CFO
BidMoni, Inc.	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > 401(k) Technology	Predictive Plan Design Tool
BlackRock	ASSET MANAGERS > Alternative Investments	Systematic Alternatives ETF
Blue Ridge Associates	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Advisor Support: Third Party Administrators	ESOP Opportunities
Bogart Wealth	INDIVIDUAL RIA FIRMS > Thought Leader of the Year	James Bogart, CEO and Founder
BondBloxx	ASSET MANAGERS > Chief Executive Officer of the Year	Leland Clemons
BondBloxx	ASSET MANAGERS > Thought Leader of the Year	JoAnne Bianco, Advancing Fixed Income Education
BondBloxx	ASSET MANAGERS > ETFs	Tax-aware Fixed Income ETF Platform
Boyer Financial Group	INDIVIDUAL RIA FIRMS > Thought Leader of the Year	Drew Boyer, Founder
bQuest	TECHNOLOGY PROVIDERS > Specialized Planning Applications	Navigator AI-Powered Care Matching
bQuest	TECHNOLOGY PROVIDERS > Thought Leadership	Longevity and Aging Care Content Series
Broadridge Advisor Solutions	TECHNOLOGY PROVIDERS > Digital Marketing Campaign of the Year	Chaos to Clarity Campaign
Bryn Mawr Trust Advisors	INDIVIDUAL RIA FIRMS > Thought Leader of the Year	Jamie Hopkins, CEO
C.T. Bauer College of Business	UNIVERSITY CFP PROGRAMS	Cougar Financial Planning Society
CAIS	TECHNOLOGY PROVIDERS > Chief Executive Officer of the Year	Matt Brown
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 > Model Marketplaces	Models Marketplace
Calamos Investments	ASSET MANAGERS > Alternative Investments	Autocallable ETFs
Calamos Investments	ASSET MANAGERS > New Product Development	Autocallable ETFs
Callan Family Office	INDIVIDUAL RIA FIRMS > Chief Technology Officer of the Year	Dan Burke
Cambridge Investment Research	BROKER-DEALERS: 1,000 Advisors or More > Chief Executive Officer of the Year	Amy Webber
Cambridge Investment Research	INSTITUTIONAL CHIEF TECHNOLOGY OFFICER OF THE YEAR	Sean Van Moorleghem
Cambridge Investment Research	M & A DEAL SUPPORT > Affiliated	Succession and Acquisition Solutions
Cambridge Investment Research	RECRUITERS > Enterprise Executive of the Year	Tammy Robbins, Chief Business Development Officer
Canoe Intelligence	TECHNOLOGY PROVIDERS > Document Management	Platform Expansions
CapIntel	TECHNOLOGY PROVIDERS > Marketing Automation	Digital Presentations
Capital Group	ASSET MANAGERS > Client Experience Initiative	Practice Management Course
Capital Group	ASSET MANAGERS > Thought Leadership	Practice Management Course
Carson Group	ESTATE PLANNING > Thought Leadership	LinkedIn Education
Carson Group	INDIVIDUAL RIA FIRMS > Innovator of the Year	Dani Fava, Chief Strategy Officer
Carson Group	INDIVIDUAL RIA FIRMS > M&A Leader of the Year	Michael Belluomini, SVP Mergers & Acquisitions
Carson Group	PODCASTS > Investor Focused	Chief Market Strategist Podcast
CAZ Investments	ASSET MANAGERS > Alternative Investments	The GP Stakes Fund
CAZ Investments	ASSET MANAGERS > New Product Development	The GP Stakes Fund
Cerity Partners	CORPORATE SOCIAL RESPONSIBILITY	Western Kentucky Financial Planning Sponsorship
Certified Financial Planner Board of Standards	INDUSTRY RESEARCH PROVIDERS	Pulse Surveys
Cetera Financial Group	BROKER-DEALERS > Practice Management	Rise to Elite Program
Cetera Financial Group	BROKER-DEALERS > Thought Leadership	Inclusive Growth Network
Cetera Financial Group	BROKER-DEALERS: 1,000 Advisors or More > Technology	AI Powered Intelligence Platform
Cetera Financial Group	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Corporate Leader of the Year	Jon Anderson, Head of Workplace & Retirement
Cetera Financial Group	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Advisor Support: Distributors	Participant Dashboard
Childfree Trust	ESTATE PLANNING > Trusts	Childfree Trust Platform
Clark Capital Management Group	ASSET MANAGERS > Chief Executive Officer of the Year	Brendan Clark
ClientWise	PROFESSIONAL SERVICES FIRMS > Chief Executive Officer of the Year	Ray Sclafani
CogniCor	TECHNOLOGY PROVIDERS > Advisor Intelligence Platforms	Embedded Advisor Intelligence
CogniCor	TECHNOLOGY PROVIDERS > Artificial Intelligence > Meeting Support	ClientMeet
CogniCor	TECHNOLOGY PROVIDERS > Business Support Systems	ClientCare
Coller Capital	ASSET MANAGERS > Alternative Investments	Secondaries Institute
Columbia University School of Professional Studies	UNIVERSITY CFP PROGRAMS	Human and AI Collaboration
Communify	TECHNOLOGY PROVIDERS > Advisor Intelligence Platforms	AI-Driven Advisor Intelligence and Insights

Communify	TECHNOLOGY PROVIDERS > Risk Tolerance/Client Profiling	Intelligent Dialogues Platform
Concurrent Investment Advisors	CORPORATE SOCIAL RESPONSIBILITY	Concurrent Cares
Concurrent Investment Advisors	INDEPENDENT, INTEGRATED GROWTH PLATFORMS	Integrated Infrastructure
Concurrent Investment Advisors	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Lower Than \$25 Billion)	Nate Lenz
Concurrent Investment Advisors	INDIVIDUAL RIA FIRMS > Chief Operations Officer of the Year	Joe McQuaid
Concurrent Investment Advisors	INDIVIDUAL RIA FIRMS > M&A Leader of the Year	Joe Mooney
Concurrent Investment Advisors	INDIVIDUAL RIA FIRMS > Rising Star of the Year	Jeremy Massullo, Managing Director of Operations
Conquest Planning	TECHNOLOGY PROVIDERS > Artificial Intelligence > Workflow Automation	Strategic Advice Manager AI Workflow Automation
Conquest Planning	TECHNOLOGY PROVIDERS > Financial Planning	Strategic Advice Manager
Conquest Planning	TECHNOLOGY PROVIDERS > Retirement Income Technology	Strategic Advice Manager
Context Analytics, A BridgeWise Company	TECHNOLOGY PROVIDERS > Advisor Intelligence Platforms	Turning Unstructured Data into Investment Intelligence
Craft & Capital	MARKETING PR FIRMS > Client PR Campaign of the Year	Tortoise ETF Campaign
Credent Wealth Management	INDIVIDUAL RIA FIRMS > Chief Investment Officer of the Year	Edison Byzyka
CreditSights	INDUSTRY RESEARCH PROVIDERS	Credit Research
Cresset	FAMILY OFFICES > Client Initiative	Client Privacy and Physical Security Enhancements
Cresset	INDIVIDUAL RIA FIRMS > Client Initiatives	Client Events and Community Building Enhancements
d1g1t	TECHNOLOGY PROVIDERS > Portfolio Management, Accounting and Performance Reporting	Platform Enhancements
d1g1t	TECHNOLOGY PROVIDERS > Rebalancing	Bulk Rebalancing
Dakota Wealth Management	INDIVIDUAL RIA FIRMS > Chief Operations Officer of the Year	Leslie Arsenault Metz
Datalign Advisory	TECHNOLOGY PROVIDERS > Artificial Intelligence > Marketing and Lead Generation	RelationshipAI
Datalign Advisory	TECHNOLOGY PROVIDERS > Innovation Platforms	AI-Native Growth Platform
Daylight	PHILANTHROPY	Philanthropic Planning Certificate
Daylight	PROFESSIONAL SERVICES FIRMS > Chief Executive Officer of the Year	Dien Yuen
DeepVest	TECHNOLOGY PROVIDERS > Portfolio Analytics	AI-Native Portfolio Analytics Platform
DeepVest	TECHNOLOGY PROVIDERS > Risk Tolerance/Client Profiling	Behavioral Finance Suitability Assessment
Definiti	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Advisor Support: Third Party Administrators	Definiti Academy
DeVoe & Company	INDUSTRY RESEARCH PROVIDERS	RIA M&A Quarterly Deal Book
DeVoe & Company	M & A DEAL SUPPORT > Industry	RIA M&A Quarterly Deal Book
DeVoe & Company	PROFESSIONAL SERVICES FIRMS > Chief Executive Officer of the Year	David DeVoe
DeVoe & Company	PROFESSIONAL SERVICES FIRMS > Chief Marketing Officer of the Year	Jennifer Sransky

Dispatch	TECHNOLOGY PROVIDERS > Client Onboarding/New Account Opening	Multi-Custodian Account Opening and Onboarding
Docupace	TECHNOLOGY PROVIDERS > Partnership Development Executive of the Year	Richard Thoeny, EVP of Product Strategy, PreciseFP
Docupace	TECHNOLOGY PROVIDERS > Digital Marketing Campaign of the Year	Future-Ready Campaign
Dovetail Financial	INDIVIDUAL RIA FIRMS > Innovator of the Year	Ross Marino, CEO
Dovetail Financial	INDIVIDUAL RIA FIRMS > Thought Leader of the Year	Ross Marino, CEO
DPL Financial Partners	RETIREMENT INCOME	AveNew Platform
Dunham	ASSET MANAGERS > Chief Marketing Officer of the Year	Salvatore M. Capizzi
Dunham	ASSET MANAGERS > Thought Leader of the Year	Adem Tumerkan, Content Editor
Dunham	ESTATE PLANNING > Advisor Service and Support	Estate Planning Education Platform
Dynamo Software	TECHNOLOGY PROVIDERS > Document Management	DynamoAI
Dynasty Financial Partners	INDEPENDENT, INTEGRATED GROWTH PLATFORMS	Dynasty Labs
Dynasty Financial Partners	INDIVIDUAL RIA FIRMS > Chief Technology Officer of the Year	Leslie Norman
Dynasty Financial Partners	INDIVIDUAL RIA FIRMS > Client Initiatives	Dynasty Labs
Dynasty Financial Partners	TAMPs	TAMP Virtual Assistant
ECHELON Partners	M & A DEAL SUPPORT > Industry	ECHELON Insights Initiative
Ed Slott and Company	VIDEO SERIES	Retirement Tax Video Series
Egnyte	TECHNOLOGY PROVIDERS > Artificial Intelligence > Workflow Automation	AI Workflows
Egnyte	TECHNOLOGY PROVIDERS > Cyber Security	AI Safeguards
Elevation Point	M & A DEAL SUPPORT > Industry	Transition and Integration Playbook
Emigrant Partners	PODCASTS > Industry Focused	The RIA+ Podcast
eMoney Advisor	TECHNOLOGY PROVIDERS > Client Portals	Client Portal Plan Explorer
eMoney Advisor	TECHNOLOGY PROVIDERS > Digital Marketing Campaign of the Year	Tomorrow's Planning Today Campaign
eMoney Advisor	TECHNOLOGY PROVIDERS > Financial Planning	CoPlanner
EncorEstate Plans	ESTATE PLANNING > Thought Leadership	AI Chatbot Study
Endeavor Retirement	VIDEO SERIES	Litigation Update Video Series
Envestnet	TAMPs	UMA Alts Integration and AI Portfolio Oversight
Envestnet	TECHNOLOGY PROVIDERS > Unified (all-in-one) Systems	Platform Enhancements
Envestnet PMC	ASSET MANAGERS > Direct Indexing	Platform Expansion
Equitable In-House Agency	VIDEO SERIES	Wealth Management Video Seres
EternaVaults	ESTATE PLANNING > Technology	EternaVault Platform
Ethic	PODCASTS > Industry Focused	Work Ethic Podcast
Ethic	TECHNOLOGY PROVIDERS > Chief Executive Officer of the Year	Doug Scott
F/m Investments	ASSET MANAGERS > New Product Development	Fixed Income ETFs
Ficomm Partners	MARKETING PR FIRMS > Client PR Campaign of the Year	SEIA Leadership Transition Campaign
Ficomm Partners	PODCASTS > Industry Focused	Growth Leaders of Wealth Management Podcast
Fidelis Capital	INDIVIDUAL RIA FIRMS > Thought Leader of the Year	Chris Gunster, Partner & Head of Fixed Income
Fidelity Charitable	PHILANTHROPY	Maximizing Charitable Planning

Fidelity Investments	ASSET MANAGERS > ETFs	Active ETF Expansion
Fidelity Investments	ASSET MANAGERS > Model Portfolio Selection	Model Portfolio Expansion
Fidelity Investments	CUSTODIANS > Technology	Wealthscape Intelligence and Digital Onboarding
Fiduciary Trust Company	CUSTODIANS > Transition Support	RIA Custody Transitions
Fiduciary Trust Company	ESTATE PLANNING > Advisor Service and Support	Elevating Estate Planning
Fiduciary Trust Company	ESTATE PLANNING > Trusts	Trust Services
Fiduciary Trust International	PHILANTHROPY	International Philanthropy Report
Financial Planning Association	INDUSTRY ASSOCIATIONS	Your Partner in Planning Program
Financial Planning Association	PODCASTS > Industry Focused	The Blueprint Podcast
Financial Planning Association	VIDEO SERIES	FPA Live Video Series
Financial Services Institute	INDUSTRY ASSOCIATIONS	AI White Paper
FINNY	DISRUPTORS > Technology	Hunter Copilot
FINNY	TECHNOLOGY PROVIDERS > Chief Executive Officer of the Year	Eden Ovadia
FINNY	TECHNOLOGY PROVIDERS > Chief Technology Officer of the Year	Theodore Janson
FINNY	TECHNOLOGY PROVIDERS > Artificial Intelligence > Marketing and Lead Generation	Hunter Growth Agent
First National Wealth Management	PODCASTS > Investor Focused	Common Cents on the Prairie Podcast
Fispoke	TECHNOLOGY PROVIDERS > Cash Optimization	Cash Management
Fispoke	TECHNOLOGY PROVIDERS > Innovation New Applications	RIA Private Banking Platform
Flourish	TECHNOLOGY PROVIDERS > Innovation New Applications	RIA Mortgage Platform
FMG	TECHNOLOGY PROVIDERS > Innovation New Applications	FMG Testimonials
Foundation Source	PHILANTHROPY	PhilTech
Foundation Source	TECHNOLOGY PROVIDERS > Chief Executive Officer of the Year	Joseph Mrak III
Foundation Source	TECHNOLOGY PROVIDERS > Thought Leadership	Philanthropic Education Program
FP Alpha	ESTATE PLANNING > Technology	Estate Insights 2.0
FP Transitions	PROFESSIONAL SERVICES FIRMS > Chief Executive Officer of the Year	Brad Bueermann
FP Transitions	PROFESSIONAL SERVICES FIRMS > Chief Marketing Officer of the Year	Elise Rogers
Franklin Templeton	ASSET MANAGERS > Alternative Investments	Private Markets Education Program: Infrastructure Modules
Future Standard	ASSET MANAGERS > Chief Marketing Officer of the Year	Stephen Tisdalle
Fynancial	TECHNOLOGY PROVIDERS > Client Portals	Bulk Data Capabilities and Integrations
Generation Capital Advisors	INDIVIDUAL RIA FIRMS > Rising Star of the Year	Sam Diarbakerly, Founder, Chief Executive Officer
Gerber Kawasaki Wealth and Investment Management	PODCASTS > Investor Focused	Chasing Finance Podcast
Global X ETFs	ASSET MANAGERS > Thought Leadership	Charting Disruption
Goldman Sachs Custody Solutions	CUSTODIANS > Alternative Asset	Access to Alternatives
Goldman Sachs Custody Solutions	CUSTODIANS > Transition Support	Transitions Experience
Gregory	PROFESSIONAL SERVICES FIRMS > Chief Executive Officer of the Year	Joe Anthony
Gresham Partners	ESTATE PLANNING > Thought Leadership	Wealth Strategy Team

Gresham Partners	INDIVIDUAL RIA FIRMS > Thought Leader of the Year	Kim Kamin, Partner & Chief Wealth Strategist
Gridline	TECHNOLOGY PROVIDERS > Alternative Investment Platforms	TAMP for Private Markets
Halo Investing	INSURANCE	Legacy Book Annuity and Insurance Service
Halo Investing	TECHNOLOGY PROVIDERS > Portfolio Analytics	Aura
Haven Tower Group	MARKETING PR FIRMS > Client PR Campaign of the Year	Ameriflex Campaign
HB Wealth	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Higher Than \$25 Billion)	Thomas Carroll
Helios	COMPLIANCE/LAW FIRMS	Helios Platform Launch
Hightower Advisors	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Higher Than \$25 Billion)	Larry Restieri
Highwire	MARKETING PR FIRMS > Client PR Campaign of the Year	CFP Board's Public Awareness Campaign
Holistiplan	CORPORATE SOCIAL RESPONSIBILITY	Student Program
Holistiplan	TECHNOLOGY PROVIDERS > Digital Marketing Campaign of the Year	Virtual Tax Planning Event Campaign
Holistiplan	TECHNOLOGY PROVIDERS > Specialized Planning Applications	OBBBA Tax Law Implementation
Horizon	ASSET MANAGERS > ETFs	"Gain, Protect, Spend" Framework
Hunter Benefits Consultant Group	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Advisor Support: Third Party Administrators	Social Media and Advisor Gatherings
iCapital	ASSET MANAGERS > Model Portfolio Selection	Public Private Model Portfolios
Idea Decanter	VIDEO SERIES	Real #Influencer Educational Video Series
Impact Communications	MARKETING PR FIRMS > Client Digital Campaign of the Year	Straightline Digital Education Campaign
IncomeConductor	TECHNOLOGY PROVIDERS > Retirement Income Technology	Advanced Annuity Modeling
Independent Financial Group	CORPORATE SOCIAL RESPONSIBILITY	Impact for Good Foundation
Inland Real Estate Investment Corporation	ASSET MANAGERS > New Product Development	Equity Portal
Insigneo Securities	BROKER-DEALERS: Fewer Than 1,000 Advisors > Technology	Integrated Multi-Custodian Platform
Insigneo Securities	VIDEO SERIES	Tuesday Quarterly Call Video Series
Insigneo Securities	BROKER-DEALERS > Thought Leadership	CIO Research and Market Insights
Insigneo Securities	INSTITUTIONAL CHIEF TECHNOLOGY OFFICER OF THE YEAR	Vikas Saxena
Inspira Financial	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Advisor Support: Service Providers	Plan Termination Platform
Integrated Partners	INDIVIDUAL RIA FIRMS > Innovator of the Year	Andree Mohr, President
Integrated Partners	INDIVIDUAL RIA FIRMS > Thought Leader of the Year	Andree Mohr, President
IntentGen Financial Partners	CORPORATE SOCIAL RESPONSIBILITY	Solstice Century Ride
Interactive Brokers	CUSTODIANS > Technology	AI-Powered Portfolio Answers
Interactive Brokers	TECHNOLOGY PROVIDERS > Portfolio Management, Accounting and Performance Reporting	Ask IBKR
Invent	TECHNOLOGY PROVIDERS > Data Lakes/Warehouses	AI Powered Data Lake Analytics Platform

InvestCloud	TECHNOLOGY PROVIDERS > Alternative Investment Platforms	Private Markets Integration in Managed Accounts
InvestorCOM	RETIREMENT INCOME	End-to-End Rollover Platform
InvestorCOM	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Convergence > Wealth and Retirement Integration	End-to-End Rollover Platform
IRALOGIX	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Convergence > Wealth and Retirement Integration	Unlocking Retirement/Wealth Convergence
J.P. Morgan Wealth Management	ASSET MANAGERS > Thought Leadership	Education Hub
Jacobi	TECHNOLOGY PROVIDERS > Portfolio Analytics	Jacobi
Janney Montgomery Scott	BROKER-DEALERS > Digital Marketing Campaign of the Year	Advisor Recruiting Campaign
Janney Montgomery Scott	BROKER-DEALERS > Practice Management	Practice Management Coaching
Janney Montgomery Scott	BROKER-DEALERS: Fewer Than 1,000 Advisors > Service	Unlock Capacity Program
Janney Montgomery Scott	BROKER-DEALERS: Fewer Than 1,000 Advisors > Technology	United Profile Program
JIFFYAI	TECHNOLOGY PROVIDERS > Artificial Intelligence > Meeting Support	Advisor Companion
JIFFYAI	TECHNOLOGY PROVIDERS > Artificial Intelligence > Workflow Automation	Account Servicing Application
JIFFYAI	TECHNOLOGY PROVIDERS > Client Onboarding/New Account Opening	Unified Onboarding Application
JIFFYAI	TECHNOLOGY PROVIDERS > Data Lakes/Warehouses	Data Warehouse and Aggregation
Jump	DISRUPTORS > Technology	Document Intelligence Application
Jump	TECHNOLOGY PROVIDERS > Chief Technology Officer of the Year	Adam Kirk
Jump	TECHNOLOGY PROVIDERS > Artificial Intelligence > Meeting Support	AI Associate Agentic Execution
Jump	TECHNOLOGY PROVIDERS > Artificial Intelligence > Workflow Automation	Back-Office Workflow Automation
Jump	TECHNOLOGY PROVIDERS > Thought Leadership	Advisor Insights and Trends Research
Kansas State University	UNIVERSITY CFP PROGRAMS	Financial Therapy Certificate
Keramas	MARKETING PR FIRMS > Client PR Campaign of the Year	Autocallable ETFs Campaign
Kestra Holdings	BROKER-DEALERS: 1,000 Advisors or More > Chief Executive Officer of the Year	James Poer
Kestra Investment Management	ASSET MANAGERS > Thought Leader of the Year	Kara Murphy, President and Chief Investment Officer
Key Private Client	BROKER-DEALERS > Practice Management	Advisor Blueprint
Key Private Client	BROKER-DEALERS > Transition Support	Banker to Advisor Pathway
Key Private Client (Key Investment Services)	BROKER-DEALERS: Fewer Than 1,000 Advisors > Service	Integrated Service Model
Kovack Financial Network	BROKER-DEALERS: Fewer Than 1,000 Advisors > Chief Executive Officer of the Year	Brian Kovack
Kwanti	TECHNOLOGY PROVIDERS > Model Marketplaces	Model Marketplace Enhancements
Lido Advisors	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Higher Than \$25 Billion)	Jason Ozur
Lincoln Financial	INSURANCE	Registered Index-Linked Annuity Features
LPL Financial	BROKER-DEALERS: 1,000 Advisors or More > Technology	ClientWorks Rebalancer

LPL Financial	INSTITUTIONAL CHIEF MARKETING OFFICER OF THE YEAR	Christa Carone
LPL Financial	M & A DEAL SUPPORT > Affiliated	Deal Support and Strategic Lending Program
Luminary	ESTATE PLANNING > Advisor Service and Support	Beneficiary Reporting and Estate Visualization Suite
Luminary	TECHNOLOGY PROVIDERS > Artificial Intelligence > Workflow Automation	Estate360
Manulife John Hancock Investments	ASSET MANAGERS > Digital Marketing Campaign of the Year	Practice Management Network Campaign
Manulife John Hancock Retirement	ASSET MANAGERS > Thought Leadership	Longevity Preparedness Index
Manulife John Hancock Retirement	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Advisor Support: Recordkeepers	Personalized Participant Engagement Program
Mariner	INDIVIDUAL RIA FIRMS > Innovator of the Year	Kenny Pointer, Chief Innovation Officer
Mariner	INDIVIDUAL RIA FIRMS > M&A Leader of the Year	Kevin Corbett, Managing Director, Corporate Development
MarketCounsel	COMPLIANCE/LAW FIRMS	The RIA Navigator
MarketCounsel	M & A DEAL SUPPORT > Industry	The RIA Navigator
MCF Advisors	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Advisor Support: Distributors	Pre-Retiree Academy
Members Trust Company	ESTATE PLANNING > Advisor Service and Support	Trust Enablement Platform
Members Trust Company	ESTATE PLANNING > Trusts	Trust Enablement Platform
Mercer Advisors	FAMILY OFFICES > Client Initiative	Tax Services
Mercer Advisors	INDIVIDUAL RIA FIRMS > Chief Investment Officer of the Year	Donald Calcagni
Mercer Advisors	INDIVIDUAL RIA FIRMS > Innovator of the Year	Jeremiah Barlow, Chief Commercial Officer
Mercer Advisors	INDIVIDUAL RIA FIRMS > M&A Leader of the Year	Martine Lellis, Executive Managing Partner, M&A Partner Development
Mercer Advisors	INDIVIDUAL RIA FIRMS > Rising Star of the Year	James Telfer, Principal
Merit Financial Advisors	INDIVIDUAL RIA FIRMS > Chief Compliance Officer of the Year	Doug Baxley
Merit Financial Advisors	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Higher Than \$25 Billion)	Rick Kent
Merit Financial Advisors	INDIVIDUAL RIA FIRMS > Chief Investment Officer of the Year	Brian Andrew
Merit Financial Advisors	INDIVIDUAL RIA FIRMS > Chief Operations Officer of the Year	Chrissy Lee
Merit Financial Advisors	INDIVIDUAL RIA FIRMS > M&A Leader of the Year	Kay Lynn Mayhue, President
Merit Financial Advisors	VIDEO SERIES	Educational Financial Planning Video Series
Merrill Center for Family Wealth	BROKER-DEALERS > Thought Leadership	Rising Generation Roundtable
Merrill Wealth Management	BROKER-DEALERS > Practice Management	Level Up Your Practice Program
Merrill Wealth Management and Bank of America Private Bank	ENTERPRISE INNOVATION	AI-Powered Meeting Journey
Milemarker	TECHNOLOGY PROVIDERS > Chief Technology Officer of the Year	Kailash Duriaswami
Milemarker	TECHNOLOGY PROVIDERS > Data Lakes/Warehouses	Data Engine
Mili	TECHNOLOGY PROVIDERS > Artificial Intelligence > Workflow Automation	Mili Office

Mission Wealth	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Lower Than \$25 Billion)	Matthew Adams
Mission Wealth	INDIVIDUAL RIA FIRMS > M&A Leader of the Year	Nicole Madosik, Partner and Chief Mergers & Integrations Officer
Mission Wealth	INDIVIDUAL RIA FIRMS > Rising Star of the Year	Cohen Taylor, Behavioral Wealth Specialist
Mitlin Financial	INDIVIDUAL RIA FIRMS > Thought Leader of the Year	Lawrence D. Sprung, Founder/Wealth Advisor
Mitlin Financial	PODCASTS > Investor Focused	The Joyful Money Journey Podcast
Modern Wealth Management	INDIVIDUAL RIA FIRMS > M&A Leader of the Year	Jason Gordo, Co-Founder and President
Moneta	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Higher Than \$25 Billion)	Eric Kittner
Moneta	INDIVIDUAL RIA FIRMS > Client Initiatives	Philanthropy Advisory Service
Morgan Stanley	BROKER-DEALERS: 1,000 Advisors or More > Technology	Portfolio Risk Platform
Morgan Stanley	BROKER-DEALERS: 1,000 Advisors or More > Technology	AI@MS Wealth Management AI Platform
Morgan Stanley	ENTERPRISE INNOVATION	AI@MS Wealth Management AI Platform
Morningstar Investment Management (Morningstar Retirement)	INDUSTRY RESEARCH PROVIDERS	Defined Contribution Outcomes Model
Morningstar Investment Management (Morningstar Retirement)	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Advisor Support: Service Providers	Fiduciary Select
Move Health	TECHNOLOGY PROVIDERS > Specialized Planning Applications	Platform Enhancements
Move Health	TECHNOLOGY PROVIDERS > Thought Leadership	OBBBA Campaign
MSCI Wealth	TECHNOLOGY PROVIDERS > Alternative Investment Platforms	U.S. Evergreen Fund Monthly Indexes
MSCI Wealth	TECHNOLOGY PROVIDERS > Portfolio Analytics	MSCI Wealth Manager
MTM Technology	TECHNOLOGY PROVIDERS > Specialized Planning Applications	AI Decision Intelligence System
My FA Coach	M & A DEAL SUPPORT > Industry	Advisor-Specific Sale/Acquisition Preparation
Nationwide	INSURANCE	Advisory VUL
NEOS Investments	ASSET MANAGERS > Chief Marketing Officer of the Year	Zachary Csillag
NEOS Investments	ASSET MANAGERS > Thought Leader of the Year	Troy Cates, Co-Founder, Managing Partner
NEOS Investments	ASSET MANAGERS > Alternative Investments	Gold High Income ETF
NEOS Investments	ASSET MANAGERS > ETFs	Tax Efficient Income
NEOS Investments	ASSET MANAGERS > New Product Development	Gold High Income ETF
Nestimate	RETIREMENT INCOME	Nestimate Platform
Nestimate	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > 401(k) Technology	Nestimate Platform
NetLaw	ESTATE PLANNING > Advisor Service and Support	Software Enhancements
NeuBeFi	DISRUPTORS > Industry	Neuro-Behavioral Marketability System
Nevis	TECHNOLOGY PROVIDERS > Artificial Intelligence > Meeting Support	AI-Powered Zoom Calls
Nevis	TECHNOLOGY PROVIDERS > Artificial Intelligence > Workflow Automation	Account Opening Workflow

Nevis	TECHNOLOGY PROVIDERS > CRM	AI Assistant
New York Life Investment Management	ASSET MANAGERS > Client Experience Initiative	Business Activator Program
New York Life Investment Management	ASSET MANAGERS > Thought Leadership	Geopolitics Program
NewEdge Capital Group	INDIVIDUAL RIA FIRMS > Client Initiatives	Bridge Solutions
Nia Impact Capital	DIVERSITY, EQUITY AND INCLUSION	Changing the Face of Finance
Nitrogen	TECHNOLOGY PROVIDERS > Partnership Development Executive of the Year	Rachel Cameron, Senior Vice President of Partnerships
Nitrogen	TECHNOLOGY PROVIDERS > Innovation New Applications	Nucleus
Nitrogen	TECHNOLOGY PROVIDERS > Risk Tolerance/Client Profiling	The Original Risk Number
Northern Trust Asset Management	ASSET MANAGERS > Digital Marketing Campaign of the Year	If You Know, You Know Campaign
Northern Trust Asset Management	ASSET MANAGERS > Direct Indexing	Advisor Education Program
Nuveen, a TIAA Company	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Advisor Support: Service Providers	Leaders in Lifetime Income
Oak Summit Wealth Management	INDIVIDUAL RIA FIRMS > Rising Star of the Year	Michael Randall, Owner
Ocean Park Asset Management	ASSET MANAGERS > Digital Marketing Campaign of the Year	Sortino the Duck Campaign
OnePoint BFG Wealth Partners	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Lower Than \$25 Billion)	Andy Schwartz
OnePoint BFG Wealth Partners	INDIVIDUAL RIA FIRMS > Chief Operations Officer of the Year	Vince Nauheimer
OnePoint BFG Wealth Partners	INDIVIDUAL RIA FIRMS > Client Initiatives	Integrated Wealth Experience
OneVest Technologies	TECHNOLOGY PROVIDERS > Chief Technology Officer of the Year	Nathan Di Lucca
OneVest Technologies	TECHNOLOGY PROVIDERS > Innovation Platforms	Agentic Wealth Operating System
Orion	ENTERPRISE INNOVATION	Denali AI Enterprise Intelligence Platform
Orion	TECHNOLOGY PROVIDERS > Chief Executive Officer of the Year	Natalie Wolfsen
Orion	TECHNOLOGY PROVIDERS > Client Onboarding/New Account Opening	Dynamic Account Opening
Orion	TECHNOLOGY PROVIDERS > Portfolio Management, Accounting and Performance Reporting	AI-Powered Portfolio Reporting and Accounting
Orion	TECHNOLOGY PROVIDERS > Unified (all-in-one) Systems	AI-Powered Summit Experience Platform
Osaic	BROKER-DEALERS: 1,000 Advisors or More > Chief Executive Officer of the Year	Jamie Price
Osaic	BROKER-DEALERS > Digital Marketing Campaign of the Year	Moments that Matter Campaign
Osaic	BROKER-DEALERS > Thought Leadership	Integrated Market Intelligence Platform
Osaic	BROKER-DEALERS > Transition Support	Transition Dashboard
Osaic	BROKER-DEALERS: 1,000 Advisors or More > Technology	PlanningHub
Owner.One	ESTATE PLANNING > Technology	Client-controlled Infrastructure Platform
Pacific Life Insurance Company	INSURANCE	Registered Index-linked Annuity
Panoramix	TECHNOLOGY PROVIDERS > Artificial Intelligence > Workflow Automation	FacetAI Integrated AI Agents

Panoramix	TECHNOLOGY PROVIDERS > Business Support Systems	One Click SEC Audit Survival
PennantPark	ASSET MANAGERS > Chief Executive Officer of the Year	Art Penn
PensionBee	TECHNOLOGY PROVIDERS > Cash Optimization	Treasury Portfolio
Perigon Wealth Management	INDIVIDUAL RIA FIRMS > Chief Compliance Officer of the Year	Jonathan Robbins
Perigon Wealth Management	INDIVIDUAL RIA FIRMS > Chief Investment Officer of the Year	Rafia Hasan
Personal Risk Management Solutions	INSURANCE	Women's Wealth Transition
Practifi	TECHNOLOGY PROVIDERS > CRM	Advisor Efficiency and Client Engagement
Prime Capital Financial	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Corporate Leader of the Year	Jania Stout, President, Retirement & Wellness
Prime Capital Financial	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Advisor Support: Distributors	The Success Hub
Principal	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Advisor Support: Recordkeepers	ARC Model
Private Advisor Group	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Higher Than \$25 Billion)	Frank Smith
Procyon	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Lower Than \$25 Billion)	Phil Fiore
ProShares	ASSET MANAGERS > New Product Development	Genius Money Market Fund ETF
Prospera Financial Services	BROKER-DEALERS: Fewer Than 1,000 Advisors > Service	Concierge Program
Prosperity Capital Advisors	INDIVIDUAL RIA FIRMS > Chief Marketing Officer of the Year	Matt Seitz
Prosperity Capital Advisors	INDIVIDUAL RIA FIRMS > Innovator of the Year	Dave Alison, President of Wealth Management
Prudential Advisors	RECRUITERS > Enterprise Executive of the Year	Terri Kinsella, VP, Head of Recruiting, Sales Enablement and Learning
R.F. Lafferty & Co.	BROKER-DEALERS: Fewer Than 1,000 Advisors > Chief Executive Officer of the Year	Robert Hackel
Raymond James	BROKER-DEALERS: 1,000 Advisors or More > Technology	Advisor AI Platform
RBC Clearing & Custody	CUSTODIANS > Transition Support	Recruiting Support
RBC Clearing & Custody	INSTITUTIONAL CHIEF TECHNOLOGY OFFICER OF THE YEAR	Noel Stave
RBC Wealth Management	BROKER-DEALERS > Digital Marketing Campaign of the Year	High-yield Deposit Campaign
RedBlack	TECHNOLOGY PROVIDERS > Rebalancing	Alternatives Trading Enhancements
Research Affiliates	ASSET MANAGERS > Thought Leader of the Year	Rob Arnott, Research Affiliates Chairman and Founder
Research Affiliates	ASSET MANAGERS > Thought Leadership	Fundamental Growth Research
Research Affiliates	INDUSTRY RESEARCH PROVIDERS	Asset Allocation Interactive Tool
RFG Advisory	INDIVIDUAL RIA FIRMS > Chief Compliance Officer of the Year	Rick Ohlrich
RFG Advisory	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Lower Than \$25 Billion)	Shannon Spotswood
RFG Advisory	INDIVIDUAL RIA FIRMS > Chief Investment Officer of the Year	Rick Wedell
RFG Advisory	INDIVIDUAL RIA FIRMS > Innovator of the Year	Jordan Hutchison, VP of Technology and Operations

RFG Advisory	INDIVIDUAL RIA FIRMS > Rising Star of the Year	Brendan Frazier, Chief Behavioral Officer
RFG Advisory	INDIVIDUAL RIA FIRMS > Thought Leader of the Year	Brendan Frazier, Chief Behavioral Officer
RFG Advisory	PODCASTS > Industry Focused	Disruption Blueprint Podcast
RIA Catalyst	M & A DEAL SUPPORT > Industry	AI-Powered RIA M&A Intelligence Platform
RIA VA Solutions	INSURANCE	Variable Annuity Gap
RightCapital	TECHNOLOGY PROVIDERS > Financial Planning	Expanded Tax-planning Features
Rise Growth Partners	M & A DEAL SUPPORT > Affiliated	Strategic Growth Partner Model
RISR	TECHNOLOGY PROVIDERS > Innovation Platforms	Succession and Exit Planning Platform
RISR	TECHNOLOGY PROVIDERS > Specialized Planning Applications	Succession Planning for Business Owners
RWA Wealth Partners	FAMILY OFFICES > Thought Leadership	Wealth With Intention
Sanctuary Wealth	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Higher Than \$25 Billion)	Adam Malamed
Savant Wealth Management	INDIVIDUAL RIA FIRMS > Chief Investment Officer of the Year	C. Zach Ivey
Savvy Advisors	INDIVIDUAL RIA FIRMS > Innovator of the Year	Ritik Malhotra, Founder & CEO, Savvy Advisors
Savvy Ladies	PODCASTS > Industry Focused	The Power of the Ask Podcast
School of Financial Planning, Texas Tech	UNIVERSITY CFP PROGRAMS	Spring Career Day
Seeds	TECHNOLOGY PROVIDERS > Business Support Systems	Automating Investment Operations
Seeds	TECHNOLOGY PROVIDERS > Direct Indexing	Direct Indexing Platform
SEI	ASSET MANAGERS > Digital Marketing Campaign of the Year	Factor Investing Campaign
SEI	CUSTODIANS > Technology	AI Virtual Assistant
Shaping Wealth	PODCASTS > Industry Focused	Chopping Wealth Podcast
Shaping Wealth	TECHNOLOGY PROVIDERS > Chief Executive Officer of the Year	Brian Portnoy
Shaping Wealth	TECHNOLOGY PROVIDERS > Innovation New Applications	Lydia Behavioral Intelligence Agent
SignatureFD	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Lower Than \$25 Billion)	Heather Fortner
Silver Oak Securities	BROKER-DEALERS > Thought Leadership	Continuity and Succession Platform
Silver Oak Securities	BROKER-DEALERS: Fewer Than 1,000 Advisors > Technology	Advisor Experience Operating System
Simplify Asset Management	ASSET MANAGERS > ETFs	Government Money Market Fund ETF
Simplify Asset Management	ASSET MANAGERS > New Product Development	Government Money Market Fund ETF
Slant	DISRUPTORS > Technology	AI-Native CRM
Slant	TECHNOLOGY PROVIDERS > Artificial Intelligence > Meeting Support	AI-Native CRM
Slant	TECHNOLOGY PROVIDERS > CRM	AI Native CRM
Slant	TECHNOLOGY PROVIDERS > Innovation Platforms	AI-Native CRM
SmartStop Self Storage REIT	ASSET MANAGERS > New Product Development	Self Storage REIT
Snappy Kraken	TECHNOLOGY PROVIDERS > Artificial Intelligence > Marketing and Lead Generation	Smart Growth Suite
Snappy Kraken	TECHNOLOGY PROVIDERS > Digital Marketing Campaign of the Year	New Tax Bill Series Campaign

Snappy Kraken	TECHNOLOGY PROVIDERS > Marketing Automation	Smart Growth Suite
Sowell Management	INDIVIDUAL RIA FIRMS > Chief Marketing Officer of the Year	Erin Taylor
SS&C Advent	TECHNOLOGY PROVIDERS > Data Lakes/Warehouses	Genesis
SS&C Advent	TECHNOLOGY PROVIDERS > Innovation Platforms	Genesis
SS&C Black Diamond® Wealth Solutions	TECHNOLOGY PROVIDERS > Partnership Development Executive of the Year	Justin Wayne, Senior Director, Partnerships
SS&C Black Diamond® Wealth Solutions	TECHNOLOGY PROVIDERS > Portfolio Management, Accounting and Performance Reporting	Holistic Reporting and Actionable Insights
SS&C Black Diamond® Wealth Solutions	TECHNOLOGY PROVIDERS > Unified (all-in-one) Systems	Unified Wealth Ecosystem
StepStone Private Wealth Solutions	ASSET MANAGERS > Chief Executive Officer of the Year	Bob Long
StepStone Private Wealth Solutions	ASSET MANAGERS > Alternative Investments	Private Equity Fund
StepStone Private Wealth Solutions	ASSET MANAGERS > Model Portfolio Selection	Private Equity Strategies Fund
Steward Partners	INDIVIDUAL RIA FIRMS > Chief Compliance Officer of the Year	Rob Guldner
Steward Partners	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Higher Than \$25 Billion)	Jim Gold
Steward Partners	INDIVIDUAL RIA FIRMS > M&A Leader of the Year	Scott Danner, Chief Growth Officer
StoneCastle	TECHNOLOGY PROVIDERS > Cash Optimization	Impact Cash
StratiFi Technologies	TECHNOLOGY PROVIDERS > Artificial Intelligence > Workflow Automation	OperationsIQ
StratiFi Technologies	TECHNOLOGY PROVIDERS > Compliance	ComplianceIQ
Stratos Wealth Partners	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Lower Than \$25 Billion)	Jeff Concepcion
Succession Resource Group	INDUSTRY RESEARCH PROVIDERS	Informed Advisor Program
Succession Resource Group	M & A DEAL SUPPORT > Industry	Advisor M&A Report
Summit Financial	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Lower Than \$25 Billion)	Stan Gregor
Summit Global Private Wealth	INDIVIDUAL RIA FIRMS > Rising Star of the Year	R.J. Cunningham, Financial Advisor & Senior Partner
SurgeONE.ai	TECHNOLOGY PROVIDERS > Compliance	AI-powered Compliance Platform
SurgeONE.ai	TECHNOLOGY PROVIDERS > Cyber Security	Unified Compliance, Cyber and Data Platform
Syntax Data	TECHNOLOGY PROVIDERS > Direct Indexing	Syntax Direct
Tactive Advisors	TECHNOLOGY PROVIDERS > Marketing Automation	AI Marketing Automation Platform
TaxStatus	DISRUPTORS > Industry	Verified Financials
TaxStatus	TECHNOLOGY PROVIDERS > Advisor Intelligence Platforms	Verified Financials
TCW	ASSET MANAGERS > ETFs	Actively Managed ETFs
The American College of Financial Services	DIVERSITY, EQUITY AND INCLUSION	Conference of African American Financial Professionals
The American College of Financial Services	DIVERSITY, EQUITY AND INCLUSION	Special Needs Planning Symposium

The American College of Financial Services	INDUSTRY ASSOCIATIONS	Consumer Awareness Campaign
The American College of Financial Services	INDUSTRY RESEARCH PROVIDERS	Onboarding Gen Z
The American College of Financial Services	PODCASTS > Industry Focused	Shares Podcast
The AmeriFlex Group	M & A DEAL SUPPORT > Affiliated	SuccessionFully Platform
The Bryn Mawr Trust Company of Delaware	ESTATE PLANNING > Trusts	Non-Charitable Purpose Trusts
The Estate Registry	ESTATE PLANNING > Thought Leadership	Estate Planning Education
The Mather Group	INDIVIDUAL RIA FIRMS > Chief Marketing Officer of the Year	Deana Lewis
The Oasis Group	INDUSTRY RESEARCH PROVIDERS	Peaks Research Series and AI Wealth Tech Map
The Oasis Group	PROFESSIONAL SERVICES FIRMS > Chief Executive Officer of the Year	John O'Connell
The Ohio State University	UNIVERSITY CFP PROGRAMS	Employer Engagement
The Wealth Consulting Group	INDIVIDUAL RIA FIRMS > Chief Investment Officer of the Year	Jim Worden
The Wealth Consulting Group	PODCASTS > Investor Focused	The Bull of Wall Street Podcast
Three Crowns Copywriting and Marketing	MARKETING PR FIRMS > Client Digital Campaign of the Year	Alphathena Brand Activation Campaign
Thrivent Financial	BROKER-DEALERS > Practice Management	Digital Business Planning Program
TIAA Wealth Management	BROKER-DEALERS: Fewer Than 1,000 Advisors > Chief Executive Officer of the Year	David G. Nason
Tortoise Capital	ASSET MANAGERS > Chief Executive Officer of the Year	Tom Florence
Tortoise Capital	ASSET MANAGERS > Thought Leader of the Year	Rob Thummel, Senior Portfolio Manager
Tortoise Capital	ASSET MANAGERS > Digital Marketing Campaign of the Year	AI Infrastructure ETF Campaign
Tortoise Capital	ASSET MANAGERS > ETFs	ETF Evolution
Tortoise Capital	ASSET MANAGERS > New Product Development	MLP Tax Efficient Access
TradePMR	INSTITUTIONAL CHIEF MARKETING OFFICER OF THE YEAR	Jessica Shores
TradeWinds	INDIVIDUAL RIA FIRMS > Rising Star of the Year	Miller Hoffman, VP, Client Experience
Triad Wealth Partners	INDIVIDUAL RIA FIRMS > Chief Compliance Officer of the Year	Dani Hampton
Trust & Will	ESTATE PLANNING > Technology	EstateOS
Trust & Will	ESTATE PLANNING > Thought Leadership	Estate Planning Research Series
Trust & Will	TECHNOLOGY PROVIDERS > Chief Executive Officer of the Year	Cody Barbo
Trust & Will	TECHNOLOGY PROVIDERS > Innovation Platforms	EstateOS
TruStage	COMPLIANCE/LAW FIRMS	Compliance Hub Alerts
Turkey Hill Management	M & A DEAL SUPPORT > Industry	Fee-based Investment Banking
Turkey Hill Management	PROFESSIONAL SERVICES FIRMS > Chief Executive Officer of the Year	Jessica Polito
U.S. Capital Wealth	INDIVIDUAL RIA FIRMS > Rising Star of the Year	James McDaniel, Managing Director
United Planners	RECRUITERS > Enterprise Executive of the Year	Sheila J Cuffari-Agasi, EVP, CRO, General Partner
United Planners Financial Services	BROKER-DEALERS: Fewer Than 1,000 Advisors > Chief Executive Officer of the Year	Michael A. Baker
United Planners Financial Services	BROKER-DEALERS > Digital Marketing Campaign of the Year	Independence Delivered Campaign

United Planners Financial Services	INSTITUTIONAL CHIEF TECHNOLOGY OFFICER OF THE YEAR	Aaron Spradlin
University of Georgia Financial Planning	UNIVERSITY CFP PROGRAMS	Four-prong Initiative
University of Illinois Urbana-Champaign	UNIVERSITY CFP PROGRAMS	Global Wealth Initiative
V-Square Quantitative Management	ASSET MANAGERS > Thought Leader of the Year	Mamadou-Abou Sarr, Co-Founder and President
V-Square Quantitative Management	ASSET MANAGERS > Thought Leadership	Chart of the Week
VanEck	PODCASTS > Investor Focused	Trends with Benefits Podcast
Vanilla	ESTATE PLANNING > Technology	AI Estate Planning Platform
Vanilla	TECHNOLOGY PROVIDERS > Thought Leadership	Estate Planning and Women Research Report
Versant Capital Management	INDIVIDUAL RIA FIRMS > Chief Operations Officer of the Year	Jennifer Kirksey
Vestmark	TECHNOLOGY PROVIDERS > Chief Technology Officer of the Year	Freedom Dumlao
Vestwell	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Corporate Leader of the Year	Aaron Schumm, Founder and CEO
Vestwell	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > 401(k) Technology	Modern Recordkeeping Platform
Vestwell	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Advisor Support: Recordkeepers	Modern Recordkeeping Platform
VistaShares	ASSET MANAGERS > ETFs	Legends + Income ETFs
Vocatus	MARKETING PR FIRMS > Client PR Campaign of the Year	Your Retirement Sketchbook Campaign
Vocatus	PROFESSIONAL SERVICES FIRMS > Chief Executive Officer of the Year	Ray Hennessey
Voya Financial	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Advisor Support: Recordkeepers	Guided Confidence Program
Voyant	TECHNOLOGY PROVIDERS > Retirement Income Technology	Objective-Based Investing Module
Wealth Enhancement	INDIVIDUAL RIA FIRMS > M&A Leader of the Year	Jim Cahn, Chair of the Investment Committee & Chief Strategy Officer
Wealth.com	ESTATE PLANNING > Advisor Service and Support	Mobile Notary and Deed Transfer Service
Wealth.com	ESTATE PLANNING > Technology	Digital Estate Planning Platform
Wealth.com	ESTATE PLANNING > Trusts	AI Trust Account Opening
Wealth.com	TECHNOLOGY PROVIDERS > Chief Executive Officer of the Year	Rafael Loureiro
Wealth.com	TECHNOLOGY PROVIDERS > Chief Marketing Officer of the Year	Dan Bolton
Wealth.com	TECHNOLOGY PROVIDERS > Partnership Development Executive of the Year	Tim White, Co-Founder and Chief Growth Officer
Wealth.com	TECHNOLOGY PROVIDERS > Innovation New Applications	AI Tax Planning Application
Wealthsites	MARKETING PR FIRMS > Client Digital Campaign of the Year	Beyond Wealth Partners Digital Launch Campaign
Wealthspire	INDIVIDUAL RIA FIRMS > Chief Executive Officer of the Year (AUM Higher Than \$25 Billion)	Mike LaMena
Wealthspire	INDIVIDUAL RIA FIRMS > Chief Marketing Officer of the Year	Angela Giombetti
Wealthspire	PODCASTS > Investor Focused	Great Aspirations Podcast
Wealthspire	RETIREMENT PLAN SUPPORT/ADVISOR SERVICES > Advisor Support: Distributors	Retirement TPA Services

Wells Fargo	RECRUITERS > Enterprise Executive of the Year	Majid Qaiser, Sr. Sourcing Consultant
Wescott Financial Advisory Group	INDIVIDUAL RIA FIRMS > Rising Star of the Year	James Ciamacco, Senior Financial Advisor
WisdomTree	ASSET MANAGERS > Chief Marketing Officer of the Year	Luba Spear
WisdomTree	ASSET MANAGERS > Model Portfolio Selection	Tax-Managed SMA Platform
WSSU CFP Program	UNIVERSITY CFP PROGRAMS	Financial Capability and Career Pathways Program
XYPN	INDEPENDENT, INTEGRATED GROWTH PLATFORMS	RIA Platform Enhancements
XYPN	PODCASTS > Industry Focused	Behind the Advisor Podcast
YCharts	TECHNOLOGY PROVIDERS > Portfolio Analytics	Individual Bond Data Prospecting Tool
Zenith Wealth Partners	DISRUPTORS > Industry	Local Capital Markets Initiative
Zephyr	TECHNOLOGY PROVIDERS > Thought Leadership	Alternatives Research Series
Zocks	TECHNOLOGY PROVIDERS > Artificial Intelligence > Workflow Automation	AI Platform Workflow Automation
Zoe Financial	TAMPs	Modern TAMP