

Wealth Management Industry Awards 2026 Finalists and Honorees by Category

Award Category	Company Name	Nomination Name
ASSET MANAGERS		
Alternative Investments	BlackRock	Systematic Alternatives ETF
	Calamos Investments	Autocallable ETFs
	CAZ Investments	The GP Stakes Fund
	Coller Capital	Secondaries Institute
	Franklin Templeton	Private Markets Education Program: Infrastructure Modules
	NEOS Investments	Gold High Income ETF
	StepStone Private Wealth Solutions	Private Equity Fund
Chief Executive Officer of the Year	BondBloxx	Leland Clemons
	Clark Capital Management Group	Brendan Clark
	PennantPark	Art Penn
	StepStone Private Wealth Solutions	Bob Long
	Tortoise Capital	Tom Florence
Chief Marketing Officer of the Year	Dunham	Salvatore M. Capizzi
	Future Standard	Stephen Tisdalle
	NEOS Investments	Zachary Csillag
	WisdomTree	Luba Spear
Client Experience Initiative	AllianceBernstein	SMA Service Center
	Capital Group	Practice Management Course
	New York Life Investment Management	Business Activator Program
Digital Marketing Campaign of the Year	AllianceBernstein	Fixed Income ETF Campaign
	Manulife John Hancock Investments	Practice Management Network Campaign
	Northern Trust Asset Management	If You Know, You Know Campaign
	Ocean Park Asset Management	Sortino the Duck Campaign
	SEI	Factor Investing Campaign
	Tortoise Capital	AI Infrastructure ETF Campaign
Direct Indexing	AllianceBernstein	Balanced Direct Index Portfolio
	Aris Investing	DI Assist
	Envestnet PMC	Platform Expansion
	Northern Trust Asset Management	Advisor Education Program
ETFs	BondBloxx	Tax-aware Fixed Income ETF Platform
	Fidelity Investments	Active ETF Expansion
	Horizon	"Gain, Protect, Spend" Framework
	NEOS Investments	Tax Efficient Income
	Simplify Asset Management	Government Money Market Fund ETF
	TCW	Actively Managed ETFs
	Tortoise Capital	ETF Evolution
	VistaShares	Legends + Income ETFs
Model Portfolio Section	Fidelity Investments	Model Portfolio Expansion
	iCapital	Public Private Model Portfolios
	StepStone Private Wealth Solutions	Private Equity Strategies Fund

	WisdomTree	Tax-Managed SMA Platform
New Product Development	Calamos Investments	Autocallable ETFs
	CAZ Investments	The GP Stakes Fund
	F/m Investments	Fixed Income ETFs
	Inland Real Estate Investment Corporation	Equity Portal
	NEOS Investments	Gold High Income ETF
	ProShares	Genius Money Market Fund ETF
	Simplify Asset Management	Government Money Market Fund ETF
	SmartStop Self Storage REIT	Self Storage REIT
	Tortoise Capital	MLP Tax Efficient Access
Thought Leadership	Allspring Global Investments	Tax Alpha and Optimization
	AssetMark	Volatility Resources Team
	Capital Group	Practice Management Course
	Global X ETFs	Charting Disruption
	J.P. Morgan Wealth Management	Education Hub
	Manulife John Hancock Retirement	Longevity Preparedness Index
	New York Life Investment Management	Geopolitics Program
	Research Affiliates	Fundamental Growth Research
	V-Square Quantitative Management	Chart of the Week
Thought Leader of the Year	BondBloxx	JoAnne Bianco, Advancing Fixed Income Education
	Dunham	Adem Tumerkan, Content Editor
	Kestra Investment Management	Kara Murphy, President and Chief Investment Officer
	NEOS Investments	Troy Cates, Co-Founder, Managing Partner
	Research Affiliates	Rob Arnott, Research Affiliates Chairman and Founder
	Tortoise Capital	Rob Thummel, Senior Portfolio Manager
	V-Square Quantitative Management	Mamadou-Abou Sarr, Co-Founder and President
BROKER-DEALERS		
Digital Marketing Campaign of the Year	Bernstein Private Wealth Management	Lead Generation Campaign
	Janney Montgomery Scott	Advisor Recruiting Campaign
	Osaic	Moments that Matter Campaign
	RBC Wealth Management	High-yield Deposit Campaign
	United Planners Financial Services	Independence Delivered Campaign
Practice Management	Cetera Financial Group	Rise to Elite Program
	Janney Montgomery Scott	Practice Management Coaching
	Key Private Client	Advisor Blueprint
	Merrill Wealth Management	Level Up Your Practice Program
	Thrivent Financial	Digital Business Planning Program
Thought Leadership	Cetera Financial Group	Inclusive Growth Network
	Insigneo Securities	CIO Research and Market Insights
	Merrill Center for Family Wealth	Rising Generation Roundtable
	Osaic	Integrated Market Intelligence Platform
	Silver Oak Securities	Continuity and Succession Platform
Transition Support	Key Private Client	Banker to Advisor Pathway
	Osaic	Transition Dashboard
BROKER-DEALERS (1,000 Advisors or More)		
Chief Executive Officer of the Year	Cambridge Investment Research	Amy Webber
	Kestra Holdings	James Poer
	Osaic	Jamie Price

Technology	Cetera Financial Group	AI Powered Intelligence Platform
	LPL Financial	ClientWorks Rebalancer
	Morgan Stanley	Portfolio Risk Platform
	Morgan Stanley	AI@MS Wealth Management AI Platform
	Osaic	PlanningHub
	Raymond James	Advisor AI Platform
BROKER-DEALERS (Fewer Than 1,000 Advisors)		
Chief Executive Officer of the Year	Kovack Financial Network	Brian Kovack
	R.F. Lafferty & Co.	Robert Hackel
	TIAA Wealth Management	David G. Nason
	United Planners Financial Services	Michael A. Baker
Service	Janney Montgomery Scott	Unlock Capacity Program
	Key Private Client (Key Investment Services)	Integrated Service Model
	Prospera Financial Services	Concierge Program
Technology	Insigneo Securities	Integrated Multi-Custodian Platform
	Janney Montgomery Scott	United Profile Program
	Silver Oak Securities	Advisor Experience Operating System
COMPLIANCE/LAW FIRMS		
	Helios	Helios Platform Launch
	MarketCounsel	The RIA Navigator
	TruStage	Compliance Hub Alerts
CORPORATE SOCIAL RESPONSIBILITY		
	Cerity Partners	Western Kentucky Financial Planning Sponsorship
	Concurrent Investment Advisors	Concurrent Cares
	Holistiplan	Student Program
	Independent Financial Group	Impact for Good Foundation
	IntentGen Financial Partners	Solstice Century Ride
CUSTODIANS		
Alternative Asset	Alto	Pre-IPO Investments
	Goldman Sachs Custody Solutions	Access to Alternatives
Technology	Altruist	AI-Powered Intelligence Engine
	Apex Fintech Solutions	AscendOS
	Fidelity Investments	Wealthscape Intelligence and Digital Onboarding
	Interactive Brokers	AI-Powered Portfolio Answers
	SEI	AI Virtual Assistant
Transition Support	Fiduciary Trust Company	RIA Custody Transitions
	Goldman Sachs Custody Solutions	Transitions Experience
	RBC Clearing & Custody	Recruiting Support
DISRUPTORS		
Industry	NeuBeFi	Neuro-Behavioral Marketability System
	TaxStatus	Verified Financials
	Zenith Wealth Partners	Local Capital Markets Initiative
Technology	Advice.ai	Advice.ai Platform Launch
	Altruist	Hazel
	Auria by Advyzon	AuRIA
	FINNY	Hunter Copilot
	Jump	Document Intelligence Application
	Slant	AI-Native CRM
DIVERSITY, EQUITY AND INCLUSION		
	Nia Impact Capital	Changing the Face of Finance

	The American College of Financial Services	Conference of African American Financial Professionals
	The American College of Financial Services	Special Needs Planning Symposium
ENTERPRISE INNOVATION		
	Merrill Wealth Management and Bank of America Private Bank	AI-Powered Meeting Journey
	Morgan Stanley	AI@MS Wealth Management AI Platform
	Orion	Denali AI Enterprise Intelligence Platform
ESTATE PLANNING		
Advisor Service and Support	AssetMark	Advanced Planning Program
	Dunham	Estate Planning Education Platform
	Fiduciary Trust Company	Elevating Estate Planning
	Luminary	Beneficiary Reporting and Estate Visualization Suite
	Members Trust Company	Trust Enablement Platform
	NetLaw	Software Enhancements
	Wealth.com	Mobile Notary and Deed Transfer Service
Technology	Asset-Map	Relationship Map Enhancements
	EternaVaults	EternaVault Platform
	FP Alpha	Estate Insights 2.0
	Owner.One	Client-controlled Infrastructure Platform
	Trust & Will	EstateOS
	Vanilla	AI Estate Planning Platform
	Wealth.com	Digital Estate Planning Platform
Thought Leadership	Carson Group	LinkedIn Education
	EncorEstate Plans	AI Chatbot Study
	Gresham Partners	Wealth Strategy Team
	The Estate Registry	Estate Planning Education
	Trust & Will	Estate Planning Research Series
Trusts	Childfree Trust	Childfree Trust Platform
	Fiduciary Trust Company	Trust Services
	Members Trust Company	Trust Enablement Platform
	The Bryn Mawr Trust Company of Delaware	Non-Charitable Purpose Trusts
	Wealth.com	AI Trust Account Opening
FAMILY OFFICES		
Client Initiative	Auria by Advyzon	AuRIA
	Cresset	Client Privacy and Physical Security Enhancements
	Mercer Advisors	Tax Services
Thought Leadership	AITi Tiedemann Global	Family Office Operational Excellence Report
	RWA Wealth Partners	Wealth With Intention
INDEPENDENT, INTEGRATED GROWTH PLATFORMS		
	Affiliated Advisors	Equity Uplift Program
	Concurrent Investment Advisors	Integrated Infrastructure
	Dynasty Financial Partners	Dynasty Labs
	XYPN	RIA Platform Enhancements
INDIVIDUAL RIA FIRM LEADERS		
Chief Compliance Officer of the Year	Apollon Wealth Management	Mike Herman
	Merit Financial Advisors	Doug Baxley
	Perigon Wealth Management	Jonathan Robbins
	RFG Advisory	Rick Ohlrich
	Steward Partners	Rob Guldner
	Triad Wealth Partners	Dani Hampton

Chief Executive Officer of the Year (AUM Higher Than \$25B)	HB Wealth	Thomas Carroll
	Hightower Advisors	Larry Restieri
	Lido Advisors	Jason Ozur
	Merit Financial Advisors	Rick Kent
	Moneta	Eric Kittner
	Private Advisor Group	Frank Smith
	Sanctuary Wealth	Adam Malamed
	Steward Partners	Jim Gold
	Wealthspire	Mike LaMena
Chief Executive Officer of the Year (AUM Lower Than \$25B)	Aspiriant	Rob Francais
	Concurrent Investment Advisors	Nate Lenz
	Mission Wealth	Matthew Adams
	OnePoint BFG Wealth Partners	Andy Schwartz
	Procyon	Phil Fiore
	RFG Advisory	Shannon Spotswood
	SignatureFD	Heather Fortner
	Stratos Wealth Partners	Jeff Concepcion
	Summit Financial	Stan Gregor
Chief Investment Officer of the Year	Credent Wealth Management	Edison Byzyka
	Mercer Advisors	Donald Calcagni
	Merit Financial Advisors	Brian Andrew
	Perigon Wealth Management	Rafia Hasan
	RFG Advisory	Rick Wedell
	Savant Wealth Management	C. Zach Ivey
	The Wealth Consulting Group	Jim Worden
Chief Marketing Officer of the Year	Prosperity Capital Advisors	Matt Seitz
	Sowell Management	Erin Taylor
	The Mather Group	Deana Lewis
	Wealthspire	Angela Giombetti
Chief Operations Officer of the Year	AlphaCore Wealth Advisory	Brian Habas
	Concurrent Investment Advisors	Joe McQuaid
	Dakota Wealth Management	Leslie Arsenault Metz
	Merit Financial Advisors	Chrissy Lee
	OnePoint BFG Wealth Partners	Vince Nauheimer
	Versant Capital Management	Jennifer Kirksey
Chief Technology Officer of the Year	AITi Tiedemann Global	Phillip Dundas
	Callan Family Office	Dan Burke
	Dynasty Financial Partners	Leslie Norman
Client Initiatives	Beacon Bridge Wealth Partners	Total Wellness Program
	Cresset	Client Events and Community Building Enhancements
	Dynasty Financial Partners	Dynasty Labs
	Moneta	Philanthropy Advisory Service
	NewEdge Capital Group	Bridge Solutions
	OnePoint BFG Wealth Partners	Integrated Wealth Experience
Innovator of the Year	Carson Group	Dani Fava, Chief Strategy Officer
	Dovetail Financial	Ross Marino, CEO
	Integrated Partners	Andree Mohr, President
	Mariner	Kenny Pointer, Chief Innovation Officer

	Mercer Advisors	Jeremiah Barlow, Chief Commercial Officer
	Prosperity Capital Advisors	Dave Alison, President of Wealth Management
	RFG Advisory	Jordan Hutchison, VP of Technology and Operations
	Savvy Advisors	Ritik Malhotra, Founder & CEO, Savvy Advisors
M&A Leader of the Year	Beacon Pointe Advisors	Matthew Cooper, President
	Carson Group	Michael Belluomini, SVP Mergers & Acquisitions
	Concurrent Investment Advisors	Joe Mooney, Managing Director, Head of Business Development
	Mariner	Kevin Corbett, Managing Director, Corporate Development
	Mercer Advisors	Martine Lellis, Executive Managing Partner, M&A Partner Development
	Merit Financial Advisors	Kay Lynn Mayhue, President
	Mission Wealth	Nicole Madosik, Partner and Chief Mergers & Integrations Officer
	Modern Wealth Management	Jason Gordo, Co-Founder and President
	Steward Partners	Scott Danner, Chief Growth Officer
	Wealth Enhancement	Jim Cahn, Chair of the Investment Committee & Chief Strategy Officer
Rising Star of the Year Honorees	Arusha Wealth	Imade Iyamu, Founder
	Ashton Thomas Private Wealth	Nico de la Vara, Wealth Advisor
	BFG Financial Advisors	Yanni Niebuhr, CFO
	Concurrent Investment Advisors	Jeremy Massullo, Managing Director of Operations
	Generation Capital Advisors	Sam Diarbakerly, Founder, Chief Executive Officer
	Mercer Advisors	James Telfer, Principal
	Mission Wealth	Cohen Taylor, Behavioral Wealth Specialist
	Oak Summit Wealth Management	Michael Randall, Owner
	RFG Advisory	Brendan Frazier, Chief Behavioral Officer
	Summit Global Private Wealth	R.J. Cunningham, Financial Advisor & Senior Partner
	TradeWinds	Miller Hoffman, VP, Client Experience
	U.S. Capital Wealth	James McDaniel, Managing Director
	Wescott Financial Advisory Group	James Ciamacco, Senior Financial Advisor
Thought Leader of the Year	Ashton Thomas Private Wealth	Cary Carbonaro, Managing Wealth Partner
	Bogart Wealth	James Bogart, CEO and Founder
	Boyer Financial Group	Drew Boyer, Founder
	Bryn Mawr Trust Advisors	Jamie Hopkins, CEO
	Dovetail Financial	Ross Marino, CEO
	Fidelis Capital	Chris Gunster, Partner & Head of Fixed Income
	Gresham Partners	Kim Kamin, Partner & Chief Wealth Strategist
	Integrated Partners	Andree Mohr, President
	Mitlin Financial	Lawrence D. Sprung, Founder/Wealth Advisor
	RFG Advisory	Brendan Frazier, Chief Behavioral Officer
INDUSTRY ASSOCIATIONS		
	Financial Planning Association	Your Partner in Planning Program
	Financial Services Institute	AI White Paper
	The American College of Financial Services	Consumer Awareness Campaign
INDUSTRY RESEARCH PROVIDERS		
	Certified Financial Planner Board of Standards	Pulse Surveys
	CreditSights	Credit Research
	DeVoe & Company	RIA M&A Quarterly Deal Book
	Morningstar Investment Management (Morningstar Retirement)	Defined Contribution Outcomes Model
	Research Affiliates	Asset Allocation Interactive Tool
	Succession Resource Group	Informed Advisor Program
	The American College of Financial Services	Onboarding Gen Z

	The Oasis Group	Peaks Research Series and AI Wealth Tech Map
INSTITUTIONAL CHIEF MARKETING OFFICER OF THE YEAR		
	Axtella	Maria Bethel
	LPL Financial	Christa Carone
	TradePMR	Jessica Shores
INSTITUTIONAL CHIEF TECHNOLOGY OFFICER OF THE YEAR		
	Cambridge Investment Research	Sean Van Moorleghem
	Insigneo Securities	Vikas Saxena
	RBC Clearing & Custody	Noel Stave
	United Planners Financial Services	Aaron Spradlin
INSURANCE		
	Halo Investing	Legacy Book Annuity and Insurance Service
	Lincoln Financial	Registered Index-Linked Annuity Features
	Nationwide	Advisory VUL
	Pacific Life Insurance Company	Registered Index-linked Annuity
	Personal Risk Management Solutions	Women's Wealth Transition
	RIA VA Solutions	Variable Annuity Gap
M&A DEAL SUPPORT		
Affiliated	Cambridge Investment Research	Succession and Acquisition Solutions
	LPL Financial	Deal Support and Strategic Lending Program
	Rise Growth Partners	Strategic Growth Partner Model
	The AmeriFlex Group	SuccessionFully Platform
Industry	Alaris Acquisitions	AI Business Support System
	Berkshire Global Advisors	Wealth Management M&A Report
	DeVoe & Company	RIA M&A Quarterly Deal Book
	ECHELON Partners	ECHELON Insights Initiative
	Elevation Point	Transition and Integration Playbook
	MarketCounsel	The RIA Navigator
	My FA Coach	Advisor-Specific Sale/Acquisition Preparation
	RIA Catalyst	AI-Powered RIA M&A Intelligence Platform
	Succession Resource Group	Advisor M&A Report
	Turkey Hill Management	Fee-based Investment Banking
MARKETING PR FIRMS		
Digital Campaign of the Year	Impact Communications	Straightline Digital Education Campaign
	Three Crowns Copywriting and Marketing	Alphathena Brand Activation Campaign
	Wealthsites	Beyond Wealth Partners Digital Launch Campaign
PR Campaign of the Year	Craft & Capital	Tortoise ETF Campaign
	Ficomm Partners	SEIA Leadership Transition Campaign
	Haven Tower Group	Ameriflex Campaign
	Highwire	CFP Board's Public Awareness Campaign
	Keramas	Autocallable ETFs Campaign
	Vocatus	Your Retirement Sketchbook Campaign
PHILANTHROPY		
	Bank of America Private Bank	Philanthropy Study
	Daylight	Philanthropic Planning Certificate
	Fidelity Charitable	Maximizing Charitable Planning
	Fiduciary Trust International	International Philanthropy Report
	Foundation Source	PhilTech
PODCASTS		
Industry Focused	Advisors Excel	The Business of Advice Podcast
	Emigrant Partners	The RIA+ Podcast
	Ethic	Work Ethic Podcast
	Ficomm Partners	Growth Leaders of Wealth Management Podcast
	Financial Planning Association	The Blueprint Podcast

	RFG Advisory	Disruption Blueprint Podcast
	Savvy Ladies	The Power of the Ask Podcast
	Shaping Wealth	Chopping Wealth Podcast
	The American College of Financial Services	Shares Podcast
	XYPN	Behind the Advisor Podcast
Investor Focused	Banrion Capital Management	Alternative Investments Education Podcast
	Carson Group	Chief Market Strategist Podcast
	First National Wealth Management	Common Cents on the Prairie Podcast
	Gerber Kawasaki Wealth and Investment Management	Chasing Finance Podcast
	Mitlin Financial	The Joyful Money Journey Podcast
	The Wealth Consulting Group	The Bull of Wall Street Podcast
	VanEck	Trends with Benefits Podcast
	Wealthspire	Great Aspirations Podcast
PROFESSIONAL SERVICES FIRMS		
Chief Executive Officer of the Year	ClientWise	Ray Sclafani
	Daylight	Dien Yuen
	DeVoe & Company	David DeVoe
	FP Transitions	Brad Bueermann
	Gregory	Joe Anthony
	The Oasis Group	John O'Connell
	Turkey Hill Management	Jessica Polito
	Vocatus	Ray Hennessey
Chief Marketing Officer of the Year	DeVoe & Company	Jennifer Sransky
	FP Transitions	Elise Rogers
RECRUITERS		
Enterprise Executive of the Year	Cambridge Investment Research	Tammy Robbins, Chief Business Development Officer
	Prudential Advisors	Terri Kinsella, VP, Head of Recruiting, Sales Enablement and Learning
	United Planners	Sheila J Cuffari-Agasi, EVP, CRO, General Partner
	Wells Fargo	Majid Qaiser, Sr. Sourcing Consultant
RETIREMENT INCOME		
	DPL Financial Partners	AveNew Platform
	InvestorCOM	End-to-End Rollover Platform
	Nestimate	Nestimate Platform
RETIREMENT PLAN SUPPORT AND ADVISOR SERVICES		
401(k) Technology	401GO	GoConnect
	BidMoni, Inc.	Predictive Plan Design Tool
	Nestimate	Nestimate Platform
	Vestwell	Modern Recordkeeping Platform
Advisor Support > Distributors	Cetera Financial Group	Participant Dashboard
	MCF Advisors	Pre-Retiree Academy
	Prime Capital Financial	The Success Hub
	Wealthspire	Retirement TPA Services
Advisor Support > Recordkeepers	Ascensus	Advisor Central
	Manulife John Hancock Retirement	Personalized Participant Engagement Program
	Principal	ARC Model
	Vestwell	Modern Recordkeeping Platform
	Voya Financial	Guided Confidence Program
Advisor Support > Service Providers	401(k) Marketing	Retirement Plan Growth Platform

	Apollo Global Management	Private Markets DC Advisor Education Program
	Inspira Financial	Plan Termination Platform
	Morningstar Investment Management (Morningstar Retirement)	Fiduciary Select
	Nuveen, a TIAA Company	Leaders in Lifetime Income
Advisor Support > Third Party Administrators	Blue Ridge Associates	ESOP Opportunities
	Definiti	Definiti Academy
	Hunter Benefits Consultant Group	Social Media and Advisor Gatherings
Convergence > Wealth and Retirement Integration	Betterment Advisor Solutions	Bridging the Gap
	InvestorCOM	End-to-End Rollover Platform
	IRALOGIX	Unlocking Retirement/Wealth Convergence
Corporate Leader of the Year	Ascensus	Nick Good, CEO
	Cetera Financial Group	Jon Anderson, Head of Workplace & Retirement
	Prime Capital Financial	Jania Stout, President, Retirement & Wellness
	Vestwell	Aaron Schumm, Founder and CEO
TAMPs		
	Advyzon Investment Management	Sphere Platform and Nucleus Model Marketplace
	Dynasty Financial Partners	TAMP Virtual Assistant
	Envestnet	UMA Alts Integration and AI Portfolio Oversight
	Zoe Financial	Modern TAMP
TECHNOLOGY PROVIDERS		
Advisor Intelligence Platforms	Advisor360°	Practice Intelligence
	CogniCor	Embedded Advisor Intelligence
	Communify	AI-Driven Advisor Intelligence and Insights
	Context Analytics, A BridgeWise Company	Turning Unstructured Data into Investment Intelligence
	TaxStatus	Verified Financials
Alternative Investment Platforms	Allocate	Private Markets Platform
	Arch	Contextualized Insights and Premium Investor Experiences
	Gridline	TAMP for Private Markets
	InvestCloud	Private Markets Integration in Managed Accounts
	MSCI Wealth	U.S. Evergreen Fund Monthly Indexes
Artificial Intelligence > Marketing and Lead Generation	AdvizorPro	AI Lead Generation Platform
	Aidentified	AI-Driven Wealth Prospecting and Lead Generation Platform
	Datalign Advisory	RelationshipAI
	FINNY	Hunter Growth Agent
	Snappy Kraken	Smart Growth Suite
Artificial Intelligence > Meeting Support	CogniCor	ClientMeet
	JIFFYAI	Advisor Companion
	Jump	AI Associate Agentic Execution
	Nevis	AI-Powered Zoom Calls
	Slant	AI-Native CRM
Artificial Intelligence > Workflow Automation	Conquest Planning	Strategic Advice Manager AI Workflow Automation
	Egnyte	AI Workflows

	JIFFYAI	Account Servicing Application
	Jump	Back-Office Workflow Automation
	Luminary	Estate360
	Mili	Mili Office
	Nevis	Account Opening Workflow
	Panoramix	FacetAI Integrated AI Agents
	StratiFi Technologies	OperationsIQ
	Zocks	AI Platform Workflow Automation
Business Support Systems	CogniCor	ClientCare
	Panoramix	One Click SEC Audit Survival
	Seeds	Automating Investment Operations
Cash Optimization	Fispoke	Cash Management
	PensionBee	Treasury Portfolio
	StoneCastle	Impact Cash
Chief Executive Officer of the Year	Altruist	Jason Wenk
	ARQA	Haik Sahakyan
	CAIS	Matt Brown
	Ethic	Doug Scott
	FINNY	Eden Ovadia
	Foundation Source	Joseph Mrak III
	Orion	Natalie Wolfson
	Shaping Wealth	Brian Portnoy
	Trust & Will	Cody Barbo
	Wealth.com	Rafael Loureiro
Chief Marketing Officer of the Year	AdvicePay	Shannon Beck
	Advyzon	Samantha Schwimmer
	CAIS	Alex Cavalieri
	Wealth.com	Dan Bolton
Chief Technology Officer of the Year	Addepar	Bob Pisani
	AdvicePay	Juniper Emnett
	Amplify Technology	David Hatfield
	CAIS	Kan Kotecha
	FINNY	Theodore Janson
	Jump	Adam Kirk
	Milemarker	Kailash Duriaswami
	OneVest Technologies	Nathan Di Lucca
	Vestmark	Freedom Dumlao
Client Onboarding / New Account Opening	Dispatch	Multi-Custodian Account Opening and Onboarding
	JIFFYAI	Unified Onboarding Application
	Orion	Dynamic Account Opening
Client Portals	eMoney Advisor	Client Portal Plan Explorer
	Fynancial	Bulk Data Capabilities and Integrations
Compliance	AdvicePay	Compliance Guardrails
	Archive Intel	AI Powered Marketing Compliance
	StratiFi Technologies	ComplianceIQ
	SurgeONE.ai	AI-powered Compliance Platform
CRM	Advyzon	CRM Workflows
	Nevis	AI Assistant

	Practifi	Advisor Efficiency and Client Engagement
	Slant	AI Native CRM
Cyber Security	Alles Technology	Risk Insights Assessment
	Egnyte	AI Safeguards
	SurgeONE.ai	Unified Compliance, Cyber and Data Platform
Data Lakes/Warehouses	Amplify Technology	AI-Native Data Lake
	BetaNXT	DataXChange
	Invent	AI Powered Data Lake Analytics Platform
	JIFFYAI	Data Warehouse and Aggregation
	Milemarker	Data Engine
	SS&C Advent	Genesis
Digital Marketing Campaign of the Year	AdvicePay	Fee-for-service Trends Campaign
	Advyzon	Morningstar Office Transition Campaign
	AssetMark	Private Markets Unlocked Campaign
	Broadridge Advisor Solutions	Chaos to Clarity Campaign
	Docupace	Future-Ready Campaign
	eMoney Advisor	Tomorrow's Planning Today Campaign
	Holistiplan	Virtual Tax Planning Event Campaign
	Snappy Kraken	New Tax Bill Series Campaign
Direct Indexing	Alphathena	Agentic Direct Indexing Platform
	Altruist	Personalized Indexing
	Seeds	Direct Indexing Platform
	Syntax Data	Syntax Direct
Document Management	ARQA	AI-Powered Data Extraction
	Canoe Intelligence	Platform Expansions
	Dynamo Software	DynamoAI
Financial Planning	Conquest Planning	Strategic Advice Manager
	eMoney Advisor	CoPlanner
	RightCapital	Expanded Tax-planning Features
Innovation New Applications	Fispoke	RIA Private Banking Platform
	Flourish	RIA Mortgage Platform
	FMG	FMG Testimonials
	Nitrogen	Nucleus
	Shaping Wealth	Lydia Behavioral Intelligence Agent
	Wealth.com	AI Tax Planning Application
Innovation Platforms	Addepar	Addison AI-Native Layer
	Advyzon	Next-Gen AI Operating System
	Datalign Advisory	AI-Native Growth Platform
	OneVest Technologies	Agentic Wealth Operating System
	RISR	Succession and Exit Planning Platform
	Slant	AI-Native CRM
	SS&C Advent	Genesis
	Trust & Will	EstateOS
Marketing Automation	CapIntel	Digital Presentations
	Snappy Kraken	Smart Growth Suite
	Tactive Advisors	AI Marketing Automation Platform
Model Marketplaces	Advyzon Investment Management	Sphere Platform and Nucleus Model Marketplace

	CAIS	Models Marketplace
	Kwanti	Model Marketplace Enhancements
Partnership Development Executive of the Year	Asset-Map	Alison Susko, Vice President of Community
	Docupace	Richard Thoeny, EVP of Product Strategy, PreciseFP
	Nitrogen	Rachel Cameron, Senior Vice President of Partnerships
	SS&C Black Diamond® Wealth Solutions	Justin Wayne, Senior Director, Partnerships
	Wealth.com	Tim White, Co-Founder and Chief Growth Officer
Portfolio Analytics	DeepVest	AI-Native Portfolio Analytics Platform
	Halo Investing	Aura
	Jacobi	Jacobi
	MSCI Wealth	MSCI Wealth Manager
	YCharts	Individual Bond Data Prospecting Tool
Portfolio Management, Accounting and Performance Reporting	d1g1t Inc.	Platform Enhancements
	Interactive Brokers	Ask IBKR
	Orion	AI-Powered Portfolio Reporting and Accounting
	SS&C Black Diamond® Wealth Solutions	Holistic Reporting and Actionable Insights
Rebalancing	d1g1t Inc.	Bulk Rebalancing
	RedBlack	Alternatives Trading Enhancements
Retirement Income Technology	Conquest Planning	Strategic Advice Manager
	IncomeConductor	Advanced Annuity Modeling
	Voyant	Objective-Based Investing Module
Risk Tolerance / Client Profiling	Communify	Intelligent Dialogues Platform
	DeepVest	Behavioral Finance Suitability Assessment
	Nitrogen	The Original Risk Number
Specialized Planning Applications	april	Integrated Tax Platform
	bQuest	Navigator AI-Powered Care Matching
	Holistiplan	OBBBA Tax Law Implementation
	Move Health	Platform Enhancements
	MTM Technology	AI Decision Intelligence System
	RISR	Succession Planning for Business Owners
Thought Leadership	Alles Technology	Cybersecurity White Papers
	Alphathena	Agentic AI Portfolio Management White Paper
	Asset-Map	Advice Engagement Event
	Betterment Advisor Solutions	Client Segmentation Playbook
	bQuest	Longevity and Aging Care Content Series
	Foundation Source	Philanthropic Education Program
	Jump	Advisor Insights and Trends Research
	Move Health	OBBBA Campaign
	Vanilla	Estate Planning and Women Research Report
	Zephyr	Alternatives Research Series
Unified (All-In-One) Systems	Advyzon	AI-Powered WealthTech Platform
	AssetMark	Public-private UMA
	Envestnet	Platform Enhancements
	Orion	AI-Powered Summit Experience Platform
	SS&C Black Diamond® Wealth Solutions	Unified Wealth Ecosystem
UNIVERSITY CFP PROGRAMS		

	C.T. Bauer College of Business	Cougar Financial Planning Society
	Columbia University School of Professional Studies	Human and AI Collaboration
	Kansas State University	Financial Therapy Certificate
	School of Financial Planning, Texas Tech	Spring Career Day
	The Ohio State University	Employer Engagement
	University of Georgia Financial Planning	Four-prong Initiative
	University of Illinois Urbana-Champaign	Global Wealth Initiative
	WSSU CFP Program	Financial Capability and Career Pathways Program
VIDEO SERIES		
	Ed Slott and Company	Retirement Tax Video Series
	Endeavor Retirement	Litigation Update Video Series
	Equitable In-House Agency	Wealth Management Video Series
	Financial Planning Association	FPA Live Video Series
	Idea Decanter	Real #Finfluencer Educational Video Series
	Insigneo Securities	Tuesday Quarterly Call Video Series
	Merit Financial Advisors	Educational Financial Planning Video Series