

## WealthManagement.com 2022 Industry Awards Winners and Honorees

ASSET MANAGERS	Nationwide	Dick Managed Income ETT Suits
Alternatives Charitable Giving/Donor Advised Funds	Nationwide Schwab Charitable	Risk-Managed Income ETF Suite  The Schwab Charitable Giving Guide
Chief Executive Officer of the Year	Diamond Hill	Heather Brilliant
Chief Marketing Officer of the Year	Russell Investments	Mollie Jensen
Corporate Social Responsibility	FS Investments	Philadelphia Financial Scholars
igital Marketing Campaign of the Year viversity, Equity and Inclusion	Natixis Investment Managers  Nationwide Financial	Sustainable Future Digital Marketing Campaign  Nationwide Retirement Institute Diverse Markets Initiative
TFs	Humankind	Humankind US Stock ETF
ixed Income	Nuveen	Global Fixed Income Impact Report
New Product Development	New York Life Investments / IndexIQ	Dual Impact ETF Suite Expansion
Real Estate (including REITs) Separate Accounts	Cohen & Steers Russell Investments	REIT Academy Russell Personalized Managed Accounts (PMA)
Socially Responsible Investing (SRI) / Impact Investing	FlexShares	ESG and Climate Suite
Thought Leadership Advisor Education	Guggenheim Investments	Behavioral Finance Initiative
hought Leadership Product Enhancement	VanEck	Digital Asset Fund Expansion
BROKER-DEALERS (All)	Cambridge Investment Research, Inc.	loffroy Vivacqua
Chief Marketing Officer of the Year Chief Technology Officer of the Year	Cambridge Investment Research, Inc. Atria Wealth Solutions	Jeffrey Vivacqua  John Reinhardt
Corporate Social Responsibility	Sigma Financial Corporation	Scaling Ukraine Relief Charitable Donations Campaign
Digital Marketing Campaign of the Year	Voya Financial	Voya's Hire thru Retire: A Health and Wealth Podcast
ROKER-DEALERS (1,000 Advisors or More) Chief Executive Officer of the Year	Cambridge Investment Research, Inc.	Amy Webber
Diversity, Equity and Inclusion	LPL Financial	Black Advisor Voices Video Series
Practice Management	Raymond James	Practice Exchange
Service	Raymond James	Remote Admin Extension
echnology hought Leadership	LPL Financial Cetera Financial Group	Clientworks Meeting Manager Fed Monitor Dashboard and Fed-o-meter
ransition Support	Commonwealth Financial Network	Virtual Transition Support (VTS)
ROKER-DEALERS (Fewer Than 1,000 Advisors)		The state of the s
hief Executive Officer of the Year	Prospera Financial Services	Tim Edwards and David Stringer
Diversity, Equity and Inclusion	Janney Montgomery Scott	IMPACT Conference
ractice Management echnology	Prospera Financial Services  Janney Montgomery Scott	Protect Engagement Score Prospect Site
hought Leadership	Bernstein Private Wealth Management	Tax Management Campaign
OMPLIANCE/LAW FIRMS		
USTODIANS	MarketCounsel Consulting	Mark by MarketCounsel
SUSTODIANS  Alternative Asset	OpenAlt	Private Market Custodian
Diversity, Equity and Inclusion	BNY Mellon's Pershing	Minority Business Enterprise Client Council
Practice Management	Schwab Advisor Services	RIA Firm Design Blueprint Consultation for Advisors in Transiti
echnology	Fidelity Investments  Fiduciary Trust Company	Enhanced Technology Offerings  Advisor Community Conversations
hought Leadership DISRUPTORS	Fiduciary Trust Company	Advisor Community Conversations
ndustry	GMO	Nebo
echnology	Summit Wealth Systems	Summit's WealthOS
CAMILY OFFICES  Client Initiative	Geller Advisors LLC	myGellerCFO
hought Leadership	Key Family Wealth	Succession Planning Strategy
NDIVIDUAL RIA FIRM LEADERS		
Chief Executive Officer of the Year	Mercer Advisors	Dave Welling
Chief Marketing Officer of the Year	Carson Group Arnerich Massena	Mary Kate Gulick
chief Technology Officer of the Year nnovator of the Year	Adhesion Wealth	David Vaughan  Barrett Ayers, President
M&A Leader of the Year	Beacon Pointe Advisors	Matthew Cooper, President
Rising Star of the Year Honorees	Beacon Pointe Advisors	Kevin DiSano, Chief Growth Officer
	Carson Group	Ana Trujillo Limón, Director of Coaching & Advisor Content
	Carson Group	Nick Engelbart, Chief Financial Officer
	Falcon Wealth Planning, Inc.	Gabriel Shahin, Principal and Founder
	HCR Wealth Advisors Intrepid Wealth Partners	Michelle Katzen, Managing Director  Derek Notman, Founder and CEO
	Mercer Advisors	Kara Duckworth, Managing Director of Client Experience
	Optas Capital	Ryan Klippel, Head of Social Impact / Financial Planner
	Robertson Stephens	Mallon FitzPatrick, Managing Director, Principal
	Waddell & Associates	Teresa J.W. Bailey, Director of Development
	Wedmont Private Capital	and Senior Wealth Strategist  James Pelletier, Co-founder
	Wipfli Financial Advisors	Rafia Hasan, Chief Investment Officer
Thought Leader of the Year	Carson Group	Ron Carson, CEO and Founder
NDUSTRY ASSOCIATIONS	National Association of Developal Financial Advisors (NADEA)	DELTraining and Cartificate Dragram
NDUSTRY RESEARCH PROVIDERS	National Association of Personal Financial Advisors (NAPFA)	DEI Training and Certificate Program
	The American College of Financial Services	Black Women, Trust, and the Financial Services Industry
NSURANCE		
NOOTHINGE.	Fiduciary Insurance Services, Llc.	DC Retirement Income Consortium
Service	Envertnet Inc	Insurance Exchange
Gervice Technology	Envestnet, Inc.	
Service  Technology  NVESTMENT BANKS/LENDERS/SUCCESSION	Envestnet, Inc.	
Service Sechnology NVESTMENT BANKS/LENDERS/SUCCESSION PLANNING CONSULTANTS	Envestnet, Inc.  PPC LOAN	Nextgen Financing and Education
Gervice Gervice Gervice Fechnology NVESTMENT BANKS/LENDERS/SUCCESSION PLANNING CONSULTANTS MARKETING   PR FIRMS		Nextgen Financing and Education  Podcast Awards
Gervice Gechnology NVESTMENT BANKS/LENDERS/SUCCESSION PLANNING CONSULTANTS MARKETING   PR FIRMS Digital Campaign of the Year	PPC LOAN	
Gervice Gechnology  NVESTMENT BANKS/LENDERS/SUCCESSION PLANNING CONSULTANTS  MARKETING   PR FIRMS Digital Campaign of the Year NON-CUSTODIAL RIA SUPPORT PLATFORMS	PPC LOAN	
Technology  NVESTMENT BANKS/LENDERS/SUCCESSION PLANNING CONSULTANTS  MARKETING   PR FIRMS  Digital Campaign of the Year  ION-CUSTODIAL RIA SUPPORT PLATFORMS  RETIREMENT PLAN SUPPORT AND ADVISOR SERVICES	PPC LOAN  FiComm Partners  RFG Advisory	Podcast Awards  RFG Assist
Technology  NVESTMENT BANKS/LENDERS/SUCCESSION PLANNING CONSULTANTS  MARKETING   PR FIRMS  Digital Campaign of the Year  NON-CUSTODIAL RIA SUPPORT PLATFORMS  RETIREMENT PLAN SUPPORT AND ADVISOR SERVICES  101(k) Service	PPC LOAN  FiComm Partners	Podcast Awards
Gervice Gechnology  NVESTMENT BANKS/LENDERS/SUCCESSION PLANNING CONSULTANTS  MARKETING   PR FIRMS Digital Campaign of the Year NON-CUSTODIAL RIA SUPPORT PLATFORMS  RETIREMENT PLAN SUPPORT AND ADVISOR SERVICES 101(k) Service 101(k) Technology	PPC LOAN  FiComm Partners  RFG Advisory  Morningstar Investment Management LLC	Podcast Awards  RFG Assist  Advisor Managed Accounts
RETIREMENT PLAN SUPPORT AND ADVISOR SERVICES  101(k) Service  101(k) Technology  102(10) Providers: Advisor Value Added Programs	PPC LOAN  FiComm Partners  RFG Advisory  Morningstar Investment Management LLC  Vestwell  HUB Retirement and Private Wealth  Franklin Templeton	Podcast Awards  RFG Assist  Advisor Managed Accounts  Vestwell Managed Accounts  Joseph DeNoyior  Voice of the American Worker Program
Gervice Gechnology  NVESTMENT BANKS/LENDERS/SUCCESSION PLANNING CONSULTANTS  MARKETING   PR FIRMS Digital Campaign of the Year  NON-CUSTODIAL RIA SUPPORT PLATFORMS  RETIREMENT PLAN SUPPORT AND ADVISOR SERVICES  101(k) Service 101(k) Technology	PPC LOAN  FiComm Partners  RFG Advisory  Morningstar Investment Management LLC  Vestwell  HUB Retirement and Private Wealth	Podcast Awards  RFG Assist  Advisor Managed Accounts  Vestwell Managed Accounts  Joseph DeNoyior
Gervice Gechnology  NVESTMENT BANKS/LENDERS/SUCCESSION PLANNING CONSULTANTS  MARKETING   PR FIRMS Digital Campaign of the Year  NON-CUSTODIAL RIA SUPPORT PLATFORMS  RETIREMENT PLAN SUPPORT AND ADVISOR SERVICES  101(k) Service 101(k) Technology 101 Aggregators: CEO of the Year 101 CIO Providers: Advisor Value Added Programs 102 Record Keepers: Retirement Plan Advisor Support 103 SUCCESSION/OWNERSHIP TRANSITION SERVICES —	PPC LOAN  FiComm Partners  RFG Advisory  Morningstar Investment Management LLC  Vestwell  HUB Retirement and Private Wealth  Franklin Templeton	Podcast Awards  RFG Assist  Advisor Managed Accounts  Vestwell Managed Accounts  Joseph DeNoyior  Voice of the American Worker Program
Gervice Gechnology  NVESTMENT BANKS/LENDERS/SUCCESSION PLANNING CONSULTANTS  MARKETING   PR FIRMS Digital Campaign of the Year  NON-CUSTODIAL RIA SUPPORT PLATFORMS  RETIREMENT PLAN SUPPORT AND ADVISOR SERVICES  101(k) Service 101(k) Technology 10	PPC LOAN  FiComm Partners  RFG Advisory  Morningstar Investment Management LLC  Vestwell  HUB Retirement and Private Wealth  Franklin Templeton	Podcast Awards  RFG Assist  Advisor Managed Accounts  Vestwell Managed Accounts  Joseph DeNoyior  Voice of the American Worker Program
Technology  NVESTMENT BANKS/LENDERS/SUCCESSION  PLANNING CONSULTANTS  MARKETING   PR FIRMS  Digital Campaign of the Year  NON-CUSTODIAL RIA SUPPORT PLATFORMS  RETIREMENT PLAN SUPPORT AND ADVISOR SERVICES  101(k) Service  101(k) Technology  Aggregators: CEO of the Year  OCIO Providers: Advisor Value Added Programs  Record Keepers: Retirement Plan Advisor Support  SUCCESSION/OWNERSHIP TRANSITION SERVICES –  NON-CUSTODIAN/BROKER-DEALER	PPC LOAN  FiComm Partners  RFG Advisory  Morningstar Investment Management LLC  Vestwell  HUB Retirement and Private Wealth  Franklin Templeton  John Hancock Retirement  DeVoe & Company	Podcast Awards  RFG Assist  Advisor Managed Accounts  Vestwell Managed Accounts  Joseph DeNoyior  Voice of the American Worker Program  Retirement Plan Advisor Support  GrowthBuilder
Gervice Gechnology  NVESTMENT BANKS/LENDERS/SUCCESSION PLANNING CONSULTANTS  MARKETING   PR FIRMS Digital Campaign of the Year  NON-CUSTODIAL RIA SUPPORT PLATFORMS  RETIREMENT PLAN SUPPORT AND ADVISOR SERVICES  101(k) Service 101(k) Technology 10	PPC LOAN  FiComm Partners  RFG Advisory  Morningstar Investment Management LLC  Vestwell  HUB Retirement and Private Wealth  Franklin Templeton  John Hancock Retirement	Podcast Awards  RFG Assist  Advisor Managed Accounts  Vestwell Managed Accounts  Joseph DeNoyior  Voice of the American Worker Program  Retirement Plan Advisor Support
Technology  NVESTMENT BANKS/LENDERS/SUCCESSION  PLANNING CONSULTANTS  MARKETING   PR FIRMS  Digital Campaign of the Year  NON-CUSTODIAL RIA SUPPORT PLATFORMS  RETIREMENT PLAN SUPPORT AND ADVISOR SERVICES  101(k) Service 101(k) Technology 101(k) T	PPC LOAN  FiComm Partners  RFG Advisory  Morningstar Investment Management LLC  Vestwell  HUB Retirement and Private Wealth  Franklin Templeton  John Hancock Retirement  DeVoe & Company  SMArtX Advisory Solutions  Eaglebrook Advisors	Podcast Awards  RFG Assist  Advisor Managed Accounts  Vestwell Managed Accounts  Joseph DeNoyior  Voice of the American Worker Program  Retirement Plan Advisor Support  GrowthBuilder  Diversified Model Marketplace with OCIO Overlay  Crypto SMA Platform
Technology  NVESTMENT BANKS/LENDERS/SUCCESSION  PLANNING CONSULTANTS  MARKETING   PR FIRMS  Digital Campaign of the Year  NON-CUSTODIAL RIA SUPPORT PLATFORMS  RETIREMENT PLAN SUPPORT AND ADVISOR SERVICES  101(k) Service  101(k) Technology 10 Aggregators: CEO of the Year  10 CIO Providers: Advisor Value Added Programs 10 Record Keepers: Retirement Plan Advisor Support  10 SUCCESSION/OWNERSHIP TRANSITION SERVICES –  NON-CUSTODIAN/BROKER-DEALER  TAMPS  Model Marketplaces	PPC LOAN  FiComm Partners  RFG Advisory  Morningstar Investment Management LLC  Vestwell  HUB Retirement and Private Wealth  Franklin Templeton  John Hancock Retirement  DeVoe & Company  SMArtX Advisory Solutions  Eaglebrook Advisors  iCapital	Podcast Awards  RFG Assist  Advisor Managed Accounts  Vestwell Managed Accounts  Joseph DeNoyior  Voice of the American Worker Program  Retirement Plan Advisor Support  GrowthBuilder  Diversified Model Marketplace with OCIO Overlay  Crypto SMA Platform  Global Distributed Ledger Solution
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ESG and Sustainability in Trusts

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Fiduciary Trust Company

