## 2024 Wealth Management.com Industry Awards

## WealthManagement.com 2024 Industry Awards Finalists and Honorees

Award Category	Company Name	Nomination Name
ADVISOR SUPPORT PLATFORMS		
	Advisory Services Network	Empowering RIAs Platform
	Affiliated Advisors	Let's Grow Program
	Cambridge Investment Group	BridgePort Financial Solutions
	Integrated Partners	Center Stage Educational Platform
	NewEdge Capital Group	Bridge Program
	RFG Advisory	Advisor Growth Program
	Sanctuary Wealth	Programs and Platforms
ASSET MANAGERS		
Alternative Investments	Amundi US	Pioneer CAT Bond Fund
	Calamos Investments	Liquid Alternatives Expansion
	DLP Capital	Build-For-Rent Communities
	Spartan Investment Group	Spartan Storage Growth Fund
	StepStone Private Wealth	Global Private Infrastructure Access
	Westmount Partners	Century Park Growth and Income Fund
Charitable Giving/Donor Advised Funds	Fiduciary Trust Company U.S. Charitable Gift Trust	Philanthropy Services
	sponsored by Eaton Vance Management	U.S. Legacy Income Trusts
Chief Executive Officer of the Year	Carrera Capital Advisors	Keith Nichol
	FS Investments	Michael Forman
	Guggenheim Investments	Dina DiLorenzo
	Research Affiliates	Chris Brightman
	Schwab Asset Management	Omar Aguilar
	SpiderRock Advisors	Eric Metz
	WisdomTree	Jonathan Steinberg
Chief Marketing Officer of the Year	Allspring	Kelly Vives
	Cohen & Steers	Paul Zettl
	Columbia Threadneedle Investments	Suzanne Lieb
Client Experience Initiative	Janus Henderson Investors	Edge - Portfolio Construction and Strategy
	Janus Henderson Investors	Onboarding and Compliance Reviews
	John Hancock Investment Management	Portfolio Insight Tool
	Northern Trust Asset Management	Investival
Digital Marketing Campaign of the Year	abrdn	Commodities Campaign
	Bitwise Asset Management	Bitcoin Campaign
	Cohen & Steers	Real Estate Roadmap Campaign
	Columbia Threadneedle	Follow the Thread Campaign
	Investments FS Investments	Cash on the Sidelines Campaign
	Janus Henderson Investors	Brand Campaign
	Nationwide	Social Security Benefits Campaign
Direct Indexing	BNY Mellon Investment Management	Precision Direct Indexing
	Envestnet	Quantitative Portfolios
	Neuberger Berman	Custom Direct Investing Program
	Parametric Portfolio	Fixed Income Direct Indexing
	Russell Investments	Direct Indexing Product and Education
ETFs	BondBloxx	BondBloxx ETFs
	Calamos Investments	Active ETFs
	CNIC Funds	Electrification ETF
	F/m Investments	Investible Credit Index
	Global X ETFs	Emerging Market ETFs
	Goldman Sachs Asset	Core Premium Income ETFs
	Management Janus Henderson Investors	ETF Product Education
	Touchstone Investments	Securitized Income ETF

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	VanEck	Digital Asset Education
Fixed Income	BondBloxx	Corporate Bond ETFs
	Breckinridge Capital Advisors	Muni Customizations
	Touchstone Investments	Securitized Income ETF
Goals-based Investment Platforms	Nebo Wealth	TAMP and Portfolio Design Platform
	OneAscent Investments	Values-Based Investing Proposal Platform
New Product Development	Amundi US	Pioneer CAT Bond Fund
	Fidelity Investments	Disruptive Strategies ETF
	Hamilton Lane	Helix
	Meketa Capital	Infrastructure Fund
	Natixis Investment Managers	Gateway Quality Income ETF
	Simplify	MBS ETF
Pool Estato (including DEITs)	Cohen & Steers	Pool Accets Compace
Real Estate (including REITs)		Real Assets Compass Urban-Core Revitalization REIT
	DLP Capital Hamilton Zanze	Multifamily Educational Campaign
	Hamilton Zanze	
hought Leadership	Cohen & Steers	Real Estate Roadmap Campaign
	Franklin Templeton	Alternative Allocations Podcast
	FS Investments	Real Stories from Financial Advisors
	Hamilton Lane	Knowledge Center
	Janus Henderson Investors	Financial Exploitation Educational Program
	Morningstar	The Market Minute
	Nationwide	Social Security Benefits Campaign
	Natixis Investment Managers	Fixed Income Pulse Survey
	Nuveen Investments	Leaders in Lifetime Income
	Research Affiliates	Smart Rebalancing Research Paper
	Wilmington Trust	Emerald GEMS Podcast
BROKER-DEALERS		
Chief Executive Officer of the Year	Cabot Lodge Securities	Craig Gould
	Park Avenue Securities	Marianne Caswell
	United Planners Financial Services	Michael A. Baker
Service	Cambridge Investment Research	Source Social Media Management
	Commonwealth Financial Network	Virtual Paraplanning Program
	Copper Financial LPL Financial	Wealth Management for Credit Unions
		High-Net-Worth Services Advisory Council for Associates and Operations
	Raymond James	Managers
BROKER-DEALERS (1,000 Advisors or More)		
Digital Marketing Campaign of the Year		
	Ameriprise Financial	"Advice Worth Talking About"
	Ameriprise Financial Cetera Financial Group	"Advice Worth Talking About" Growth Guarantee Campaign
		-
	Cetera Financial Group	Growth Guarantee Campaign
	Cetera Financial Group Kestra Private Wealth Services	Growth Guarantee Campaign Precision-Targeted Tuck-in Campaign
	Cetera Financial Group Kestra Private Wealth Services Nationwide	Growth Guarantee Campaign Precision-Targeted Tuck-in Campaign Social Security Benefits Campaign
Practice Management	Cetera Financial Group Kestra Private Wealth Services Nationwide	Growth Guarantee Campaign Precision-Targeted Tuck-in Campaign Social Security Benefits Campaign
Practice Management	Cetera Financial Group Kestra Private Wealth Services Nationwide Raymond James	Growth Guarantee Campaign Precision-Targeted Tuck-in Campaign Social Security Benefits Campaign Intergenerational Wealth Transfer Campaign
Practice Management	Cetera Financial Group Kestra Private Wealth Services Nationwide Raymond James Avantax Wealth Management	Growth Guarantee Campaign Precision-Targeted Tuck-in Campaign Social Security Benefits Campaign Intergenerational Wealth Transfer Campaign Peer-to-Peer Mentorship
	Cetera Financial Group Kestra Private Wealth Services Nationwide Raymond James Avantax Wealth Management Kestra Financial RBC Wealth Management – U.S.	Growth Guarantee Campaign Precision-Targeted Tuck-in Campaign Social Security Benefits Campaign Intergenerational Wealth Transfer Campaign Peer-to-Peer Mentorship Advisor Fee Pricing Educational Program CX360
	Cetera Financial Group Kestra Private Wealth Services Nationwide Raymond James Avantax Wealth Management Kestra Financial RBC Wealth Management – U.S.	Growth Guarantee Campaign Precision-Targeted Tuck-in Campaign Social Security Benefits Campaign Intergenerational Wealth Transfer Campaign Peer-to-Peer Mentorship Advisor Fee Pricing Educational Program CX360 Digital Account Opening
	Cetera Financial Group Kestra Private Wealth Services Nationwide Raymond James Avantax Wealth Management Kestra Financial RBC Wealth Management – U.S. Kestra Financial	Growth Guarantee Campaign Precision-Targeted Tuck-in Campaign Social Security Benefits Campaign Intergenerational Wealth Transfer Campaign Peer-to-Peer Mentorship Advisor Fee Pricing Educational Program CX360 Digital Account Opening ClientWorks Rebalancer
	Cetera Financial Group Kestra Private Wealth Services Nationwide Raymond James Avantax Wealth Management Kestra Financial RBC Wealth Management – U.S. Kestra Financial LPL Financial Merrill Wealth Management	Growth Guarantee Campaign Precision-Targeted Tuck-in Campaign Social Security Benefits Campaign Intergenerational Wealth Transfer Campaign Peer-to-Peer Mentorship Advisor Fee Pricing Educational Program CX360 Digital Account Opening ClientWorks Rebalancer Merrill Video Pro
	Cetera Financial Group Kestra Private Wealth Services Nationwide Raymond James Avantax Wealth Management Kestra Financial RBC Wealth Management – U.S. Kestra Financial	Growth Guarantee Campaign Precision-Targeted Tuck-in Campaign Social Security Benefits Campaign Intergenerational Wealth Transfer Campaign Peer-to-Peer Mentorship Advisor Fee Pricing Educational Program CX360 Digital Account Opening ClientWorks Rebalancer
ſechnology	Cetera Financial Group Kestra Private Wealth Services Nationwide Raymond James Avantax Wealth Management Kestra Financial RBC Wealth Management – U.S. Kestra Financial LPL Financial Merrill Wealth Management	Growth Guarantee Campaign Precision-Targeted Tuck-in Campaign Social Security Benefits Campaign Intergenerational Wealth Transfer Campaign Peer-to-Peer Mentorship Advisor Fee Pricing Educational Program CX360 Digital Account Opening ClientWorks Rebalancer Merrill Video Pro
ſechnology	Cetera Financial Group Kestra Private Wealth Services Nationwide Raymond James Avantax Wealth Management Kestra Financial RBC Wealth Management – U.S. Kestra Financial LPL Financial Merrill Wealth Management Morgan Stanley	Growth Guarantee Campaign Precision-Targeted Tuck-in Campaign Social Security Benefits Campaign Intergenerational Wealth Transfer Campaign Peer-to-Peer Mentorship Advisor Fee Pricing Educational Program CX360 Digital Account Opening ClientWorks Rebalancer Merrill Video Pro Al @ Morgan Stanley Assistant
ſechnology	Cetera Financial Group Kestra Private Wealth Services Nationwide Raymond James Avantax Wealth Management Kestra Financial RBC Wealth Management - U.S. Kestra Financial LPL Financial LPL Financial Merrill Wealth Management Morgan Stanley	Growth Guarantee Campaign Precision-Targeted Tuck-in Campaign Social Security Benefits Campaign Intergenerational Wealth Transfer Campaign Peer-to-Peer Mentorship Advisor Fee Pricing Educational Program CX360 Digital Account Opening ClientWorks Rebalancer Merrill Video Pro AI @ Morgan Stanley Assistant Cambridge Stronger Podcast
ſechnology	Cetera Financial GroupKestra Private Wealth ServicesNationwideRaymond JamesAvantax Wealth ManagementKestra FinancialRBC Wealth Management - U.S.Kestra FinancialLPL FinancialMerrill Wealth ManagementMorgan StanleyCambridge Investment ResearchCetera Financial Group	Growth Guarantee Campaign Precision-Targeted Tuck-in Campaign Social Security Benefits Campaign Intergenerational Wealth Transfer Campaign Peer-to-Peer Mentorship Advisor Fee Pricing Educational Program CX360 Digital Account Opening ClientWorks Rebalancer Merrill Video Pro Al @ Morgan Stanley Assistant Cambridge Stronger Podcast Women's + Employee Research Group
Гechnology Гhought Leadership	Cetera Financial GroupKestra Private Wealth ServicesNationwideRaymond JamesAvantax Wealth ManagementKestra FinancialRBC Wealth Management - U.S.Kestra FinancialLPL FinancialMerrill Wealth ManagementMorgan StanleyCambridge Investment ResearchCetera Financial Group	Growth Guarantee Campaign Precision-Targeted Tuck-in Campaign Social Security Benefits Campaign Intergenerational Wealth Transfer Campaign Peer-to-Peer Mentorship Advisor Fee Pricing Educational Program CX360 Digital Account Opening ClientWorks Rebalancer Merrill Video Pro Al @ Morgan Stanley Assistant Cambridge Stronger Podcast Women's + Employee Research Group
Practice Management Fechnology Fhought Leadership	Cetera Financial Group Kestra Private Wealth Services Nationwide Raymond James Avantax Wealth Management Kestra Financial RBC Wealth Management - U.S. Kestra Financial LPL Financial Merrill Wealth Management Morgan Stanley Cambridge Investment Research Cetera Financial Group Nationwide Cetera Financial Group	Growth Guarantee Campaign Precision-Targeted Tuck-in Campaign Social Security Benefits Campaign Intergenerational Wealth Transfer Campaign Peer-to-Peer Mentorship Advisor Fee Pricing Educational Program CX360 Digital Account Opening ClientWorks Rebalancer Merrill Video Pro AI @ Morgan Stanley Assistant Cambridge Stronger Podcast Women's + Employee Research Group Peak Retirement
Гechnology Гhought Leadership	Cetera Financial GroupKestra Private Wealth ServicesNationwideRaymond JamesAvantax Wealth ManagementKestra FinancialRBC Wealth Management - U.S.Kestra FinancialLPL FinancialMerrill Wealth ManagementMorgan StanleyCambridge Investment ResearchCetera Financial GroupNationwidePurshe Kaplan Sterling Investments	Growth Guarantee Campaign Precision-Targeted Tuck-in Campaign Social Security Benefits Campaign Intergenerational Wealth Transfer Campaign Intergenerational Wealth Transfer Campaign Peer-to-Peer Mentorship Advisor Fee Pricing Educational Program CX360 Digital Account Opening ClientWorks Rebalancer Merrill Video Pro Al @ Morgan Stanley Assistant Cambridge Stronger Podcast Women's + Employee Research Group Peak Retirement Accesslink Purchase and Maintenance Programs
Гechnology Гhought Leadership	Cetera Financial Group Kestra Private Wealth Services Nationwide Raymond James Avantax Wealth Management Kestra Financial RBC Wealth Management - U.S. Kestra Financial LPL Financial Merrill Wealth Management Morgan Stanley Cambridge Investment Research Cetera Financial Group Nationwide Cetera Financial Group	Growth Guarantee Campaign Precision-Targeted Tuck-in Campaign Social Security Benefits Campaign Intergenerational Wealth Transfer Campaign Peer-to-Peer Mentorship Advisor Fee Pricing Educational Program CX360 Digital Account Opening ClientWorks Rebalancer Merrill Video Pro AI @ Morgan Stanley Assistant Cambridge Stronger Podcast Women's + Employee Research Group Peak Retirement

	Oppenheimer & Co.	Joan Khoury
Digital Marketing Campaign of the Year	Janney Montgomery Scott	Strength and Stability Campaign
	Oppenheimer & Co.	The Power of Oppenheimer Thinking
	United Planners Financial Services	"Yes, It's True" Campaign
Practice Management	Prospera Financial Services	Generational Wealth
	United Planners Financial Services	LEAPS Program
	Bernstein Private Wealth	
Technology	Management	Portfolio Transition Analysis
	Janney Montgomery Scott	Advisory Platform Evolution
	Rockefeller Capital Management	Premier Digital Client Experience
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Thought Leadership	Axtella TIAA Wealth Management	Attracting the Next Generation Campaign Market Trends Investing Education
CHIEF TECHNOLOGY OFFICER OF THE		
YEAR		
	Bernstein Private Wealth Management	Tuppy Russo
	Cresset	Paul Algreen
	Fiduciary Trust International	Rod Sayegh
	Merrill Wealth Management	Inez Louzonis
	Northwestern Mutual	Jeff Sippel
	Robertson Stephens Wealth	Vikram Chugh
COMPLIANCE/LAW FIRMS	Management	
	Buckler	Cyber Program Management Platform
	Smartria	"Always Audit-Ready" Campaign
CORPORATE SOCIAL RESPONSIBILITY		
	Cambridge Investment Research	Ignite "Giving Back" Program
	Cambridge Investment Research	The Next Step® Internship
	FinServ Foundation	Next Gen Mentorship and Coaching
	LPL Financial Foundation	Championing the Next Generation
	North Star Resource Group	Financial Literacy Initiatives
	United Planners Financial Services	ReachUP Program
CUCTODIANC		
CUSTODIANS		
Practice Management	Interactive Brokers	Retirement Plan Administration Account
	SEI	Community Connect
Practice Management	SEI TradePMR	Community Connect Advisor Evolution Sciences
	SEI TradePMR Altruist	Community Connect Advisor Evolution Sciences Technology Integration
Practice Management	SEI TradePMR	Community Connect Advisor Evolution Sciences
Practice Management	SEI TradePMR Altruist Apex Fintech Solutions	Community Connect Advisor Evolution Sciences Technology Integration Apex Astra
Practice Management	SEI TradePMR Altruist Apex Fintech Solutions	Community Connect Advisor Evolution Sciences Technology Integration Apex Astra
Practice Management Technology	SEI TradePMR Altruist Apex Fintech Solutions TradePMR	Community Connect Advisor Evolution Sciences Technology Integration Apex Astra Apollo
Practice Management Technology	SEI TradePMR Altruist Apex Fintech Solutions TradePMR Apex Fintech Solutions Fidelity Investments Fiduciary Trust Company	Community Connect Advisor Evolution Sciences Technology Integration Apex Astra Apollo Transition Assist Tool Transition to Independence Custody and Trust Services
Practice Management Technology Transition Support	SEI TradePMR Altruist Apex Fintech Solutions TradePMR Apex Fintech Solutions Fidelity Investments	Community Connect Advisor Evolution Sciences Technology Integration Apex Astra Apollo Transition Assist Tool Transition to Independence
Practice Management Technology Transition Support DISRUPTORS	SEI TradePMR Altruist Apex Fintech Solutions TradePMR Apex Fintech Solutions Fidelity Investments Fiduciary Trust Company SEI	Community Connect Advisor Evolution Sciences Technology Integration Apex Astra Apollo Transition Assist Tool Transition to Independence Custody and Trust Services Growth Lab
Practice Management Technology Transition Support	SEI TradePMR Altruist Apex Fintech Solutions TradePMR Apex Fintech Solutions Fidelity Investments Fiduciary Trust Company SEI Assetlink	Community Connect Advisor Evolution Sciences Technology Integration Apex Astra Apollo Transition Assist Tool Transition to Independence Custody and Trust Services Growth Lab
Practice Management Technology Transition Support DISRUPTORS	SEI TradePMR Altruist Apex Fintech Solutions TradePMR Apex Fintech Solutions Fidelity Investments Fiduciary Trust Company SEI Assetlink N2 Content Marketing	Community Connect Advisor Evolution Sciences Technology Integration Apex Astra Apollo Transition Assist Tool Transition to Independence Custody and Trust Services Growth Lab AI Platform Short Form Video Marketing
Practice Management Technology Transition Support DISRUPTORS	SEI TradePMR Altruist Apex Fintech Solutions TradePMR Apex Fintech Solutions Fidelity Investments Fiduciary Trust Company SEI Assetlink N2 Content Marketing Shaping Wealth	Community Connect Advisor Evolution Sciences Technology Integration Apex Astra Apollo Transition Assist Tool Transition to Independence Custody and Trust Services Growth Lab AI Platform Short Form Video Marketing BeFi Summit
Practice Management Technology Transition Support DISRUPTORS	SEI TradePMR Altruist Apex Fintech Solutions TradePMR Apex Fintech Solutions Fidelity Investments Fiduciary Trust Company SEI SEI Assetlink N2 Content Marketing Shaping Wealth Transitus Wealth Partners	Community Connect Advisor Evolution Sciences Technology Integration Apex Astra Apollo Transition Assist Tool Transition to Independence Custody and Trust Services Growth Lab AI Platform Short Form Video Marketing BeFi Summit SHIFT Conference
Practice Management Technology Transition Support DISRUPTORS	SEI TradePMR Altruist Apex Fintech Solutions TradePMR Apex Fintech Solutions Fidelity Investments Fiduciary Trust Company SEI Assetlink N2 Content Marketing Shaping Wealth	Community Connect Advisor Evolution Sciences Technology Integration Apex Astra Apollo Transition Assist Tool Transition to Independence Custody and Trust Services Growth Lab AI Platform Short Form Video Marketing BeFi Summit
Practice Management Technology Transition Support DISRUPTORS	SEI TradePMR Altruist Apex Fintech Solutions TradePMR Apex Fintech Solutions Fidelity Investments Fiduciary Trust Company SEI SEI Assetlink N2 Content Marketing Shaping Wealth Transitus Wealth Partners	Community Connect Advisor Evolution Sciences Technology Integration Apex Astra Apollo Transition Assist Tool Transition to Independence Custody and Trust Services Growth Lab AI Platform Short Form Video Marketing BeFi Summit SHIFT Conference
Practice Management Technology Transition Support DISRUPTORS Industry	SEI TradePMR Altruist Apex Fintech Solutions TradePMR Apex Fintech Solutions Fidelity Investments Fiduciary Trust Company SEI Assetlink N2 Content Marketing Shaping Wealth Transitus Wealth Partners	Community Connect Advisor Evolution Sciences Technology Integration Apex Astra Apollo Transition Assist Tool Transition to Independence Custody and Trust Services Growth Lab AI Platform Short Form Video Marketing BeFi Summit SHIFT Conference Compliant Video Testimonials
Practice Management Technology Transition Support DISRUPTORS Industry	SEI TradePMR Altruist Apex Fintech Solutions TradePMR Apex Fintech Solutions Fidelity Investments Fiduciary Trust Company SEI Assetlink N2 Content Marketing Shaping Wealth Transitus Wealth Partners Vidiance	Community Connect Advisor Evolution Sciences Technology Integration Apex Astra Apollo Transition Assist Tool Transition to Independence Custody and Trust Services Growth Lab AI Platform Short Form Video Marketing BeFi Summit SHIFT Conference Compliant Video Testimonials
Practice Management Technology Transition Support DISRUPTORS Industry	SEI TradePMR Altruist Apex Fintech Solutions TradePMR Apex Fintech Solutions Fidelity Investments Fiduciary Trust Company SEI SEI Assetlink N2 Content Marketing Shaping Wealth Transitus Wealth Partners Vidiance ARQA Buckler	Community Connect Advisor Evolution Sciences Technology Integration Apex Astra Apollo Transition Assist Tool Transition to Independence Custody and Trust Services Growth Lab Al Platform Short Form Video Marketing BeFi Summit SHIFT Conference Compliant Video Testimonials
Practice Management Technology Transition Support DISRUPTORS Industry	SEI TradePMR Altruist Apex Fintech Solutions TradePMR Apex Fintech Solutions Fidelity Investments Fiduciary Trust Company SEI Sal Sasetlink N2 Content Marketing Shaping Wealth N2 Content Marketing Shaping Wealth Transitus Wealth Partners Vidiance ARQA Buckler Datalign Advisory illuminote	Community Connect Advisor Evolution Sciences Technology Integration Apex Astra Apollo Transition Assist Tool Transition to Independence Custody and Trust Services Growth Lab AI Platform Short Form Video Marketing BeFi Summit ShIFT Conference Compliant Video Testimonials AI Platform AI Platform Cyber Program Management Platform Advanced Auction Segmentation Digital Asset Registry and Clearinghouse AI Meeting Assistant
Practice Management Technology Transition Support DISRUPTORS Industry	SEITradePMRAltruistApex Fintech SolutionsTradePMRApex Fintech SolutionsFidelity InvestmentsFiduciary Trust CompanySEIAssetlinkN2 Content MarketingShaping WealthTransitus Wealth PartnersVidianceARQABucklerDatalign AdvisoryilluminoteJumpOpto Investments	Community Connect Advisor Evolution Sciences Technology Integration Apex Astra Apollo Transition Assist Tool Transition to Independence Custody and Trust Services Growth Lab Custody and Trust Services Growth Lab Al Platform Al Platform Short Form Video Marketing BeFi Summit SHIFT Conference Compliant Video Testimonials Al Platform Al Platform Cyber Program Management Platform Advanced Auction Segmentation Digital Asset Registry and Clearinghouse Al Meeting Assistant Custom Fund Capabilities
Practice Management  Fechnology  DISRUPTORS Industry  Technology	SEI TradePMR Altruist Apex Fintech Solutions TradePMR Apex Fintech Solutions Fidelity Investments Fiduciary Trust Company SEI Sal Sasetlink N2 Content Marketing Shaping Wealth N2 Content Marketing Shaping Wealth Transitus Wealth Partners Vidiance ARQA Buckler Datalign Advisory illuminote	Community Connect Advisor Evolution Sciences Technology Integration Apex Astra Apollo Transition Assist Tool Transition to Independence Custody and Trust Services Growth Lab AI Platform Short Form Video Marketing BeFi Summit ShrIFT Conference Compliant Video Testimonials AI Platform AI Platform Cyber Program Management Platform Advanced Auction Segmentation Digital Asset Registry and Clearinghouse AI Meeting Assistant
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Practice Management  Fechnology  DISRUPTORS Industry  Technology	SEI TradePMR Altruist Apex Fintech Solutions TradePMR Apex Fintech Solutions Fidelity Investments Fiduciary Trust Company SEI Assetlink N2 Content Marketing Shaping Wealth N2 Content Marketing Shaping Wealth Transitus Wealth Partners Vidiance ARQA Buckler Datalign Advisory illuminote Jump Opto Investments The Oasis Group	Community Connect Advisor Evolution Sciences Technology Integration Apex Astra Apollo Transition Assist Tool Transition to Independence Custody and Trust Services Growth Lab Custody and Trust Services Growth Lab Al Platform Short Form Video Marketing BeFi Summit SHIFT Conference Compliant Video Testimonials Al Platform Al Platform Cyber Program Management Platform Advanced Auction Segmentation Digital Asset Registry and Clearinghouse Al Meeting Assistant Custom Fund Capabilities Cybersecurity Assessment Services
Practice Management  Fechnology  DISRUPTORS Industry  Technology	SEITradePMRAltruistApex Fintech SolutionsTradePMRMapex Fintech SolutionsFidelity InvestmentsFiduciary Trust CompanySEIAssetlinkN2 Content MarketingShaping WealthTransitus Wealth PartnersVidianceJudianceJumpOpto InvestmentsThe Oasis GroupCetera Financial GroupColdstream Wealth Management	Community Connect Advisor Evolution Sciences Technology Integration Apex Astra Apollo Transition Assist Tool Transition to Independence Custody and Trust Services Growth Lab Custody and Trust Services Growth Lab Al Platform Short Form Video Marketing BeFi Summit ShIFT Conference Compliant Video Testimonials Al Platform Al Platform Cyber Program Management Platform Advanced Auction Segmentation Digital Asset Registry and Clearinghouse Al Meeting Assistant Custom Fund Capabilities Cybersecurity Assessment Services
Practice Management  Technology  DISRUPTORS Industry  Technology	SEITradePMRAltruistApex Fintech SolutionsTradePMRApex Fintech SolutionsFidelity InvestmentsFiduciary Trust CompanySEIAssetlinkN2 Content MarketingShaping WealthTransitus Wealth PartnersVidianceARQABucklerJumpOpto InvestmentsJumpCetera Financial GroupColdstream Wealth ManagementDaylight Advisors	Community Connect Advisor Evolution Sciences Technology Integration Apex Astra Apollo Transition Assist Tool Transition to Independence Custody and Trust Services Growth Lab AI Platform AI Platform Short Form Video Marketing BeFi Summit SHIFT Conference Compliant Video Testimonials HIFT Conference Compliant Video Testimonials AI Platform Gyber Program Management Platform Advanced Auction Segmentation Digital Asset Registry and Clearinghouse AI Meeting Assistant Custom Fund Capabilities Cybersecurity Assessment Services
Practice Management  Technology  DISRUPTORS Industry  Technology	SEITradePMRAltruistApex Fintech SolutionsTradePMRApex Fintech SolutionsFidelity InvestmentsFiduciary Trust CompanySEIAssetlinkN2 Content MarketingShaping WealthTransitus Wealth PartnersVidianceJumpJumpOpto InvestmentsThe Oasis GroupCetera Financial GroupGalyight AdvisorsFiduciary Trust International	Community Connect Advisor Evolution Sciences Technology Integration Apex Astra Apollo Transition Assist Tool Transition Assist Tool Transition to Independence Custody and Trust Services Growth Lab Custody and Trust Services Growth Lab Al Platform Short Form Video Marketing BeFi Summit SHIFT Conference Compliant Video Testimonials Growth Video Testimonials Cyber Program Management Platform Advanced Auction Segmentation Digital Asset Registry and Clearinghouse Al Meeting Assistant Custom Fund Capabilities Cybersecurity Assessment Services Black Advisor Community Program Executive Leadership Transforming Lives and Communities
Practice Management  Technology  DISRUPTORS Industry  Technology	SEITradePMRAltruistApex Fintech SolutionsTradePMRApex Fintech SolutionsFidelity InvestmentsFiduciary Trust CompanySEIAssetlinkN2 Content MarketingShaping WealthTransitus Wealth PartnersVidianceARQABucklerJumpOpto InvestmentsJumpCetera Financial GroupColdstream Wealth ManagementDaylight Advisors	Community Connect Advisor Evolution Sciences Technology Integration Apex Astra Apollo Transition Assist Tool Transition to Independence Custody and Trust Services Growth Lab AI Platform Short Form Video Marketing BeFi Summit SHIFT Conference Compliant Video Testimonials HIFT Conference Compliant Video Testimonials Al Platform Cyber Program Management Platform Advanced Auction Segmentation Digital Asset Registry and Clearinghouse AI Meeting Assistant Custom Fund Capabilities Cybersecurity Assessment Services

	Nationwide Retirement Institute	Diverse Markets Program
	Prudential Advisors	Women Advisors Campaign
	The American College of Financial	
	Services	Special Needs Planning Symposium
FAMILY OFFICES	Voya Financial	Workplace Financial Equity Perspectives
Client Initiative	Callan Family Office	Family Governance and Education Program
	CV Advisors	CV Client App
	Fortitude Family Office	Private Lending Partnership
	Key Family Wealth	Family Governance Services
INDIVIDUAL RIA FIRM LEADERS		
Chief Executive Officer of the Year (AUM More Than \$20 Billion)	Mercer Advisors	Dave Welling
	NewEdge Advisors	Alex Goss
	Private Advisor Group	Frank Smith
	Sanctuary Wealth	Adam Malamed
	Savant Wealth Management	Brent Brodeski
	Signature Estate & Investment Advisors	Brian Holmes
	The Colony Group	Michael J. Nathanson
	Wealth Enhancement Advisory	
	Services	Jeff Dekko
	Wealthspire Advisors	Mike LaMena
Chief Executive Officer of the Year (AUM Under \$20 Billion)	Aspiriant	Rob Francais
	Callan Family Office	Jack Ginter
	Concurrent	Nate Lenz
	Dakota Wealth Management	Peter Raimondi
	Falcon Wealth Planning	Gabriel Shahin
	Integrated Partners	Paul Saganey
	Keebeck Wealth Management	Bruce K. Lee
	Merit Financial Advisors	Rick Kent
	Nemes Rush Family Wealth Management	Charles Nemes
	Perigon Wealth Management	Arthur Ambarik
Chief Marketing Officer of the Year	Choreo LLC	Marissa Fox-Foley
	EdgeCo Holdings	Chris Broussard
	Private Advisor Group	Kelly Coulter
	Verdence Capital Advisors	Michele Welsh
	Wealthspire Advisors	Angela Giombetti
Client Initiatives	Caprock	Impact Investing Reporting Platform
	Cerity Partners	Family Office Offering
	JFS Wealth Advisors	Business Growth and Transitions Service
	Mason Investment Advisory Services NewEdge Wealth	Women of Wealth Initiative Onward Entrepreneur Series
	Regent Peak Wealth Advisors	Tailored Client Service
	Schmidt Financial Management	Tax Dashboard
Innovator of the Year	Alpha Financial Advisors	Ann Reilley, CEO
	Amplified Planning	Hannah Moore, Founder of The Externship and CEO of Guiding Wealth
	Capital Investment Advisors	Matt Reiner, Managing Partner and Senior Investment Advisor
	Mercer Advisors	Shala Schultz, Director, Product Management   Advisory Portal
	Transitus Wealth Partners	Ross Marino, CEO and Founder
M&A Leader of the Year	Carson Group	Michael Belluomini, Vice President of Mergers and Acquisitions
	Credent Wealth Management	David Hefty, CEO
	Edelman Financial Engines	Suzanne van Staveren, EVP, CFO and COO
	Integrated Partners	Robert Sandrew, Chief Growth Officer
	Mercer Advisors	Dave Barton, Vice Chairman and M&A Team Leader
	NewEdge Advisors	Neil Turner, Co-Founder and Co-CEO
	Perigon Wealth Management Wealthspire Advisors	Art Ambarik, CEO and M&A Leader Hoyt Stastney, General Counsel and Head of M&A
Rising Star of the Year Honorees	Bryn Mawr Capital Management	Andrew N. Davis, Head of Macroeconomic Research
	Falcon Wealth Planning	Nicky Amore, Managing Director

	NewEdge Advisors	Jeff Cutler, Chief Experience Officer and Managing Partner
	Snowden Lane Partners	Joseph Raieta, EVP, Head of Investments
	Verdence Capital Advisors	Lucas R. Belanger, Private Wealth Advisor
Thought Leader of the Year	AlphaCore Wealth Advisory	Johann Lee, Director of Research
	Bailard	Blaine Townsend, EVP, Director, Sustainable, Responsible and Impact Investing
	Capital Investment Advisors	Matt Reiner, Managing Partner and Senior
		Investment Advisor
	Coldstream Wealth Management	Anne Marie Stonich, Chief Wealth Strategist
	Prosperity Capital Advisors	Dave Alison, President and Founding Partner
	Sanctuary Wealth	Mary Ann Bartels, Chief Investment Strategist
	Strategic Retirement Partners	Deane Mayerhofer
INDUSTRY ASSOCIATIONS		
	Financial Planning Association	Membership Magnet
	Investments & Wealth Institute	IWI Academy
INDUSTRY RESEARCH PROVIDERS		
	55ip, a subsidiary of J.P. Morgan Asset Management	Tax Harvest Indicator
	Brightwave	Al Financial Research Assistant
	Certified Financial Planner Board	
	of Standards	Actionable Insights Research
	Daylight Advisors	Philanthropic Research
	Devoe & Company	Heart of the Deal
	Diamond Consultants	Advisor Transition Report
	Nasdaq Dorsey Wright	Nasdaq Dorsey Wright Podcast
	Research Affiliates	Asset Allocation Interactive Tool
	The American College of Financial	
	Services	Retirement Income Literacy Study
	VettaFl	Expanded Research Offerings
INSURANCE		
	Envestnet	Access to Annuities
	iPipeline	Annuity Status Tracker
	Jackson	Registered Index-Linked Annuity (RILA)
	Progyny	Women's Health Benefits
	Voya Financial	Connected Workplace Experiences
MARKETING   PR FIRMS	Voya Financial	Connected Workplace Experiences
MARKETING   PR FIRMS Digital Campaign of the Year	Voya Financial Ficomm Partners	Connected Workplace Experiences Wealth is a Woman's World Campaign
	Ficomm Partners	Wealth is a Woman's World Campaign
	Ficomm Partners Idea Decanter	Wealth is a Woman's World Campaign Membership Magnet
	Ficomm Partners Idea Decanter Intention.ly	Wealth is a Woman's World Campaign Membership Magnet Advisor Brand Builder
Digital Campaign of the Year	Ficomm Partners Idea Decanter Intention.ly Snappy Kraken	Wealth is a Woman's World Campaign Membership Magnet Advisor Brand Builder Behavior Gap Audience Builder Changing the Conversation on Race in Wealth
	Ficomm Partners Idea Decanter Intention.ly Snappy Kraken Haven Tower Group	Wealth is a Woman's World Campaign Membership Magnet Advisor Brand Builder Behavior Gap Audience Builder Changing the Conversation on Race in Wealth Management
Digital Campaign of the Year	Ficomm Partners Idea Decanter Intention.ly Snappy Kraken Haven Tower Group Keramas	Wealth is a Woman's World Campaign Membership Magnet Advisor Brand Builder Behavior Gap Audience Builder Changing the Conversation on Race in Wealth Management Active ETFs for Alternatives
Digital Campaign of the Year	Ficomm Partners Idea Decanter Intention.ly Snappy Kraken Haven Tower Group Keramas Vocatus	Wealth is a Woman's World Campaign Membership Magnet Advisor Brand Builder Behavior Gap Audience Builder Changing the Conversation on Race in Wealth Management Active ETFs for Alternatives RIA PR Campaign
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Digital Campaign of the Year	Ficomm Partners Idea Decanter Intention.ly Snappy Kraken Haven Tower Group Keramas Vocatus Water & Wall	Wealth is a Woman's World Campaign Membership Magnet Advisor Brand Builder Behavior Gap Audience Builder Changing the Conversation on Race in Wealth Management Active ETFs for Alternatives RIA PR Campaign The Role of Earned Media
Digital Campaign of the Year PR Campaign of the Year	Ficomm Partners Idea Decanter Intention.ly Snappy Kraken Haven Tower Group Keramas Vocatus Water & Wall Daylight Advisors	Wealth is a Woman's World Campaign Membership Magnet Advisor Brand Builder Behavior Gap Audience Builder Changing the Conversation on Race in Wealth Management Active ETFs for Alternatives RIA PR Campaign The Role of Earned Media Delivering Impact Strategies
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Digital Campaign of the Year         PR Campaign of the Year         PHILANTHROPY         RETIREMENT INCOME         RETIREMENT PLAN SUPPORT AND ADVISOR SERVICES	Ficomm Partners         Idea Decanter         Intention.ly         Snappy Kraken         Haven Tower Group         Keramas         Vocatus         Water & Wall         Daylight Advisors         Foundation Source         TIFIN Give         Osaic         PIMCO         TruStage	Wealth is a Woman's World CampaignMembership MagnetAdvisor Brand BuilderBehavior Gap Audience BuilderChanging the Conversation on Race in Wealth ManagementActive ETFs for AlternativesRIA PR CampaignThe Role of Earned MediaDelivering Impact StrategiesClient Meeting Kit Al-Powered Digital Philanthropy PlatformNextPhaseRetirement Income Model PortfoliosMyComfortZone
Digital Campaign of the Year   PR Campaign of the Year   PHILANTHROPY   RETIREMENT INCOME   RETIREMENT PLAN SUPPORT AND	<ul> <li>Ficomm Partners</li> <li>Idea Decanter</li> <li>Intention.ly</li> <li>Snappy Kraken</li> <li>Haven Tower Group</li> <li>Keramas</li> <li>Vocatus</li> <li>Vocatus</li> <li>Water &amp; Wall</li> <li>Daylight Advisors</li> <li>Foundation Source</li> <li>TIFIN Give</li> <li>Osaic</li> <li>PIMCO</li> <li>TruStage</li> <li>Bryn Mawr Trust</li> </ul>	Wealth is a Woman's World CampaignMembership MagnetAdvisor Brand BuilderBehavior Gap Audience BuilderChanging the Conversation on Race in Wealth ManagementActive ETFs for AlternativesRIA PR CampaignThe Role of Earned MediaDelivering Impact StrategiesClient Meeting Kit AI-Powered Digital Philanthropy PlatformNextPhaseRetirement Income Model Portfolios MyComfortZoneTrust and Wealth as a Service
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Aggregators > CEO of the Year	Alera Group	Christian Mango, EVP and National Retirement Practice Leader
	HUB Retirement and Private	Joseph DeNoyior, President
	Wealth Marsh McLennan Agency	Craig Reid, President and National Practice Leader, Retirement and Wealth
	Strategic Retirement Partners	Jeff Cullen, CEO
Broker-Dealers - Wealth and Retirement Integration	Cambridge Investment Research, Inc.	Retirement Plan Advisors Service
	Osaic	Generation (k)ultivate Retirement Plan Advisors and HR Industry
	Raymond James	Collaboration
DCIO Providers > Advisor Value Added	Franklin Templeton	Voice of the American Workplace
Programs	Morningstar Retirement,	Voice of the American Workplace
	Morningstar Investment Management	Personalized Managed IRAs
	Nuveen Investments	Lifetime Income Solutions in Target Date Funds
In-plan Retirement Income - Product or	401(k) Appuits (1).	Market Intelligence Convice
Service	401(k) Annuity Hub Allianz Life Insurance Company of	Market Intelligence Service
	North America	Lifetime Income Annuity
	iJoin Income America	Retirement Income Marketplace In-plan Guaranteed Retirement Income
	LeafHouse	Personalized Plan Income Portfolio Technology
	Nuveen Investments	Lifetime Income Solutions in Target Date Funds
Record Keepers > Corporate Leader of the Year	Ascensus	David Musto, Chair and CEO
	Empower	Rich Linton, President and Chief Operating Officer
	Principal Financial Group	Teresa Hassara, SVP, Workplace Savings and Retirement Solutions
	Vestwell	Aaron Schumm, Founder and CEO
Record Keepers > Retirement Plan	104.50	
Advisor Support	401GO Ascensus	Bundled Record Keeping Platform Pooled Employer Plan Adoption Campaign
	Empower	Proposal System
	John Hancock	State of the Participant Campaign
	T. Rowe Price	Financial Wellness Confidence Builder
	Voya Financial	Thrive Program
SUCCESSION/OWNERSHIP TRANSITION		
SERVICES – NON-CUSTODIAN/BROKER- DEALER		
	Advisor Legacy	Building Equity for Nextgen Advisors
	Bluespring Wealth Partners	Building for the Next Generation
	Diamond Consultants	Diamond Podcast Series
TAMPs	The AmeriFlex Group®	Growth Opportunities
Model Marketplaces	Adhesion Wealth Advisor Solutions	Model Marketplace Manager Exchange
	Advyzon Investment Management	Nucleus Model Marketplace
	GeoWealth	Curated Model Marketplace
	SMArtX Advisory Solutions	SMArtY Platform
TAMPs	Absolute Capital Management	Pre-rollover Asset Management
	Advyzon Investment Management	Platform Launch
	AssetMark	Tax Management Services
	FusionIQ	FIQ TAMP+
	GeoWealth	GeoWealth Platform
	Orion Advisor Solutions SMArtX Advisory Solutions	Redtail CRM Integration SMArtY Platform
	Zoe Financial	Zoe Wealth Platform
TECHNOLOGY PROVIDERS		
Account Aggregation	BridgeFT	Data Enrichment Capabilities
	Future Capital	Aggregation Platform
	Sora Finance	Liability Data Aggregation
	Wealth Access	Unified Financial Portfolio Data
Alternative Investment Platforms	Alkymi	Alternative Investment Document Processing
	AltExchange	AdvisorVue
	CAIS	CAIS Solutions

	Canoe Intelligence	Canoe Intelligence and Asset Data
	Eaglebrook	Digital Asset SMA Platform
	Energia.com	Energy Alternatives Access
	Helix by HL	Private Market Navigation
	iCapital	iCapital Architect Tool
	Opto Investments	Private Investments Management Platform
	SUBSCRIBE	Alternative Investment Operating System
	JODJENDE	, itemative investment operating system
Artificial Intelligence	Alkymi	Alpha Generative Al Solution
	Alphathena	AI-Optimized Direct Indexing
	Assetlink	AI Platform
	Catchlight	Using AI to Capture Asset Growth Potential
	CogniCor Technologies	Co-Pilot
	Datalign Advisory	AI-Enhanced Lead Validation, Verification and
		Generation
	Jump	Al Meeting Assistant
	RegVerse	Avery
	Sora Finance	Liability Insights and Loan Pricing + Execution
	Willow Network	Women/NextGen Matching Platform
Business Support Systems   Workflow		
Automation	Absolute Engagement	Engagement Engine
	Bento Engine	Bento Direct
	Canoe Intelligence	Canoe Intelligence and Asset Data
	Laserfiche	Generative AI-Powered Document Summarization
	Panoramix	Bill 'Em Now
Cash Optimization	Advisor Credit Exchange	Cash Management Product
	Flourish	Flourish Cash
	Interactive Brokers	Rising Interest Rates and Cash Strategy
	A 11	
Chief Executive Officer of the Year	Addepar	Eric Poirier
	Apex Fintech Solutions	Bill Capuzzi
	Asset-Map	H. Adam Holt
	AssetBook	Marwa Zakharia
	CAIS	Matt Brown
	Catchlight	Wilbur Swan
	iCapital	Lawrence Calcano
	Invent	Oleg Tishkevich
	Snappy Kraken	Robert Sofia
	Vestwell Wealth.com	Aaron Schumm Rafael Loureiro
	wealth.com	Rafael Loureiro
Chief Marketing Officer of the Year	Catchlight	Daniel Gilmartin
	Flourish	Abby Domine
	Nitrogen	Craig Clark
	Snappy Kraken	Angel Gonzalez
	Vanilla	Jim Sinai
Chief Technology Officer of the Year	CAIS	Shane Williams
	Flourish	Josh Owen
	Orion	Mustapha Baassiri
	SMArtX Advisory Solutions	Aaron Wormus
	Vanilla	Amjad Hussian
Client Onboarding / New Account	Advisor360°	Envestnet Integration
Opening		
	Andes Wealth Technologies	"Smarting-up" Client Onboarding Platform
	Laserfiche	New Client Onboarding Solutions
	Quik!	30-second Onboarding
Client Portals	FactSet	Investment Dashboard
	SEI	New Investor Portal
	SS&C Black Diamond Wealth	
	Platform	Digital Engagement
	Summit Wealth Systems	Wealth Home
	Wealth Access	Unified Wealth and Digital Banking Platform
Compliance	InvestorCOM	AccountCompare
	Laserfiche	Compliance Initiative

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Catchlight     AI Driven Engagement and Lead Conversion       Snappy Kraken     Marketing Hub       Testimonial iQ     Unlocking the SEC Marketing Rule for Advisers	Innovation New Applications	Trust & WillVanillaVanillaAsset-MapeMoney AdvisorOrionAssetlinkCouplr AlJumpNEXA InsightsSora FinanceVanillaBridgeFTCAISEaglebrookEnvestnetFoundation SourceilluminoteInventShaping WealthSummit Wealth Systems	<ul> <li>Estate Planning Insights and Dashboard</li> <li>Estate Advisory Platform</li> <li>Empowering Financial Planning Evolution</li> <li>Multi-View in Decision Center</li> <li>PulseCheck</li> <li>Al Platform</li> <li>Client Acquisition Software</li> <li>Al Meeting Assistant</li> <li>Key Features</li> <li>Liability Planning and Optimization Software</li> <li>Vanilla Scenarios™</li> <li>Platform Expansion</li> <li>CAIS Solutions</li> <li>Direct Indexing for Crypto</li> <li>Wealth Management Platform</li> <li>PhilTech Platform</li> <li>Digital Asset Registry and Clearinghouse</li> <li>SuperAPP Platform</li> <li>Outsourced Chief Behavioral Officer</li> <li>Client Experience Platform</li> </ul>
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	Innovation New Applications Innovation Platforms	Trust & WillVanillaVanillaAsset-MapeMoney AdvisorOrionAssetlinkCouplr AlJumpNEXA InsightsSora FinanceVanillaBridgeFTCAISEaglebrookEnvestnetFoundation SourceilluminoteInventShaping WealthSummit Wealth SystemsYChartsFoadridge FinancialCatchlightSnappy KrakenTestimonial iQ	Estate Planning Insights and Dashboard         Estate Advisory Platform         Empowering Financial Planning Evolution         Multi-View in Decision Center         PulseCheck         Image: Platform         Client Acquisition Software         Al Platform         Client Acquisition Software         Al Meeting Assistant         Key Features         Liability Planning and Optimization Software         Vanilla Scenarios™         Platform Expansion         CAIS Solutions         Direct Indexing for Crypto         Wealth Management Platform         PhilTech Platform         Digital Asset Registry and Clearinghouse         SuperAPP Platform         Outsourced Chief Behavioral Officer         Client Experience Platform         YCharts Proposals         Marketing Hub         Unlocking the SEC Marketing Rule for Advisers

Model Marketplaces	Adhesion Wealth Advisor Solutions	Model Marketplace Manager Exchange
Model Marketplaces	Charles River Development	Wealth Hub
	Kwanti	Model Marketplace and Model Portfolio Tracking
Portfolio Analytics	AltExchange	AdvisorVue
	Kwanti	Portfolio Analytics Platform
	Opto Investments	Portfolio Analytics Suite
	Zephyr	Zephyr Spotlight on Asset Managers
Portfolio Management, Accounting and	Advyzon	Advyzon Conference
Performance Reporting	, avyzon	
	Jacobi	Investment Technology for Asset Owners
	MyVest	Tax-Aware Portfolio Transitions
	Pontera	Third-party Technology Integrations
	SS&C Technologies	Aloha
Rebalancing	Adv. (700	Quantum Rebalancer
Reparationing	Advyzon	AdvisorArch
	Apex Fintech Solutions Helios	Customizable Rebalancing
	intelliflo	redblack Enhancements
	Intenno	
Retirement Income	Broadridge Financial Solutions	Guaranteed Income Options Within Retirement Plans Thought Leadership
	IncomePath	Annuity Retirement Income Software
	MyVest	Tax-optimized Income in Retirement
	Panoramix	Contributions and Distributions Reporting
		Longevity Risk, Disability, and Long-Term Care
	Voyant	Retirement Planning Solutions
Risk Tolerance / Client Profiling	Andes Wealth Technologies	Risk Tolerance/Client Profiling
	Nitrogen	Next-Generation Risk Questionnaire with Client Check-ins
	Tolerisk	Portfolio Scoring and Risk Monitoring Tool
Securities-based Lending	Advisor Credit Exchange	Advisor Credit Exchange Platform
	Interactive Brokers	Securities Lending Dashboard
	Interactive Brokers	
Specialized Planning Applications	Interactive Brokers Asset-Map	Securities Lending Dashboard Asset-Map Updates Drive Future of Financial Planning
Specialized Planning Applications		Asset-Map Updates Drive Future of Financial
Specialized Planning Applications	Asset-Map	Asset-Map Updates Drive Future of Financial Planning
Specialized Planning Applications	Asset-Map Caribou	Asset-Map Updates Drive Future of Financial Planning Healthcare Planning Software
Specialized Planning Applications	Asset-Map Caribou Charityvest Daffy FP Alpha	Asset-Map Updates Drive Future of Financial Planning Healthcare Planning Software Custom-branded Donor-advised Fund Donor-advised Fund Platform Roth Conversion Simulator
Specialized Planning Applications	Asset-Map Caribou Charityvest Daffy FP Alpha Holistiplan	Asset-Map Updates Drive Future of Financial Planning Healthcare Planning Software Custom-branded Donor-advised Fund Donor-advised Fund Platform Roth Conversion Simulator Property and Casualty Tool
Specialized Planning Applications	Asset-Map Caribou Charityvest Daffy FP Alpha Holistiplan Sora Finance	Asset-Map Updates Drive Future of Financial Planning Healthcare Planning Software Custom-branded Donor-advised Fund Donor-advised Fund Platform Roth Conversion Simulator Property and Casualty Tool Liability Planning and Optimization Software
Specialized Planning Applications	Asset-Map Caribou Charityvest Daffy FP Alpha Holistiplan	Asset-Map Updates Drive Future of Financial Planning Healthcare Planning Software Custom-branded Donor-advised Fund Donor-advised Fund Platform Roth Conversion Simulator Property and Casualty Tool
	Asset-Map Caribou Charityvest Daffy FP Alpha Holistiplan Sora Finance Whealthcare Planning	Asset-Map Updates Drive Future of Financial Planning Healthcare Planning Software Custom-branded Donor-advised Fund Donor-advised Fund Platform Roth Conversion Simulator Property and Casualty Tool Liability Planning and Optimization Software WhealthBot
Specialized Planning Applications	Asset-Map Caribou Charityvest Daffy FP Alpha Holistiplan Sora Finance Whealthcare Planning	Asset-Map Updates Drive Future of Financial Planning Healthcare Planning Software Custom-branded Donor-advised Fund Donor-advised Fund Platform Roth Conversion Simulator Property and Casualty Tool Liability Planning and Optimization Software WhealthBot Fee-for-Service Industry Trend Report
	Asset-Map Caribou Charityvest Daffy FP Alpha Holistiplan Sora Finance Whealthcare Planning AdvicePay Asset-Map	Asset-Map Updates Drive Future of Financial Planning Healthcare Planning Software Custom-branded Donor-advised Fund Donor-advised Fund Platform Roth Conversion Simulator Property and Casualty Tool Liability Planning and Optimization Software WhealthBot Fee-for-Service Industry Trend Report AdviceTech.LIVE
	Asset-Map Caribou Charityvest Daffy FP Alpha Holistiplan Sora Finance Whealthcare Planning	Asset-Map Updates Drive Future of Financial Planning Healthcare Planning Software Custom-branded Donor-advised Fund Donor-advised Fund Platform Roth Conversion Simulator Property and Casualty Tool Liability Planning and Optimization Software WhealthBot Fee-for-Service Industry Trend Report
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Thought Leadership Unified (All-In-One) Systems	Asset-Map Caribou Charityvest Daffy FP Alpha Holistiplan Sora Finance Whealthcare Planning Whealthcare Planning Whealthcare Planning AdvicePay Asset-Map Dynasty Financial Partners FMG iCapital Nitrogen FMG iCapital Nitrogen Paychex Rethink Financial Advice Shaping Wealth Zephyr Amplify Technology Envestnet Orion	Asset-Map Updates Drive Future of Financial Planning Healthcare Planning Software Custom-branded Donor-advised Fund Donor-advised Fund Platform Roth Conversion Simulator Property and Casualty Tool Liability Planning and Optimization Software WhealthBot Fee-for-Service Industry Trend Report AdviceTech.LIVE Advisor to CEO Program Growth Guides Beyond 60/40, Newsletter and Video Series The Fearless Investing Summit Financial Advisor Webinar Series Rethink Podcast Building the Behavioral Advisor A to Zephyr Podcast Client Dashboard Wealth Management Ecosystem Orion Systems Integration
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