10TH ANNUAL 2024 WealthManagement.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	Philanthropy Services
	U.S. Charitable Gift Trust 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 Investments	Follow the Thread Campaign
	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 Management	Core Premium Income ETFs
	Janus Henderson Investors	ETF Product Education
	Touchstone Investments	Securitized Income ETF

	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
Real Estate (including REITs)	Cohen & Steers	Real Assets Compass
	DLP Capital	Urban-Core Revitalization REIT
	Hamilton Zanze	Multifamily Educational Campaign
Thought 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	Wealth Management for Credit Unions
	LPL Financial	High-Net-Worth Services
	Raymond James	Advisory Council for Associates and Operations Managers
BROKER-DEALERS (1,000 Advisors or More)		
Digital Marketing Campaign of the Year	Ameriprise Financial	"Advice Worth Talking About"
	Cetera Financial Group	Growth Guarantee Campaign
	Kestra Private Wealth Services	Precision-Targeted Tuck-in Campaign
	Nationwide	Social Security Benefits Campaign
	Raymond James	Intergenerational Wealth Transfer Campaign
Practice Management	Avantax Wealth Management	Peer-to-Peer Mentorship
	Kestra Financial	Advisor Fee Pricing Educational Program
	RBC Wealth Management – U.S.	CX360
Technology	Kestra Financial	Digital Account Opening
	LPL Financial	ClientWorks Rebalancer
	Merrill Wealth Management	Merrill Video Pro
	Morgan Stanley	AI @ Morgan Stanley Assistant
Thought Leadership	Cambridge Investment Research	Cambridge Stronger Podcast
	Cetera Financial Group	Women's + Employee Research Group
	Nationwide	Peak Retirement
Transition Support	Cetera Financial Group	Accesslink
	Purshe Kaplan Sterling Investments	Purchase and Maintenance Programs
	Raymond James	Enhanced Onboarding Support
BROKER–DEALERS (Fewer Than 1,000 Advisors)		
Chief Marketing Officer of the Year	Axtella	Maria Bethel

	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
Technology	Bernstein Private Wealth Management	Portfolio Transition Analysis
	Janney Montgomery Scott	Advisory Platform Evolution
	Rockefeller Capital Management	Premier Digital Client Experience
Thought Leadership	Axtella	Attracting the Next Generation Campaign
	TIAA Wealth Management	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 Management	Vikram Chugh
COMPLIANCE/LAW FIRMS		
	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
CUSTODIANS		
Practice Management	Interactive Brokers	Retirement Plan Administration Account
	SEI	Community Connect
	TradePMR	Advisor Evolution Sciences
Technology	Altruist	Technology Integration
	Apex Fintech Solutions	Apex Astra
Transition Support	Apex Fintech Solutions	Transition Assist Tool
	Fidelity Investments	Transition to Independence
	Fiduciary Trust Company	Custody and Trust Services
	SEI	Growth Lab
DISRUPTORS		
Industry	Assetlink	AI Platform
	N2 Content Marketing	Short Form Video Marketing
	Shaping Wealth	BeFi Summit
	Transitus Wealth Partners	SHIFT Conference
	Vidiance	Compliant Video Testimonials
Technology	ARQA	AI Platform
	Buckler	Cyber Program Management Platform
	Datalign Advisory	Advanced Auction Segmentation
	illuminote	Digital Asset Registry and Clearinghouse
	Jump	AI Meeting Assistant
	Opto Investments	Custom Fund Capabilities
	The Oasis Group	Cybersecurity Assessment Services
DIVERSITY, EQUITY AND INCLUSION		
	Cetera Financial Group	Black Advisor Community Program
	Coldstream Wealth Management	Executive Leadership
	Daylight Advisors	Transforming Lives and Communities
	Fiduciary Trust International	DEI Council Launch
	Financial Alliance for Racial Equity	HBCU Student Conference
	Janney Montgomery Scott	DEI IMPACT Conference

	Nationwide Retirement Institute	Diverse Markets Program
	Prudential Advisors	Women Advisors Campaign
	The American College of Financial Services	Special Needs Planning Symposium
	Voya Financial	Workplace Financial Equity Perspectives
FAMILY OFFICES		
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	Women of Wealth Initiative
	NewEdge Wealth	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	Art Ambarik, CEO and M&A Leader
	Wealthspire Advisors	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	AI 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
	VettaFI	Expanded Research Offerings
INSURANCE		
	Envestnet	Envestnet – Access to Annuities via the Insurance Exchange
	iPipeline	Annuity Status Tracker
	Jackson	Registered Index-Linked Annuity (RILA) Digital Ecosystem
	Progyny	Women's Health Benefits
	Voya Financial	Connected Workplace Experiences
MARKETING | PR FIRMS		
Digital Campaign of the Year	Ficomm Partners	Wealth is a Woman's World Campaign
	Idea Decanter	Membership Magnet
	Intention.ly	Advisor Brand Builder
	Snappy Kraken	Behavior Gap Audience Builder
PR Campaign of the Year	Haven Tower Group	Changing the Conversation on Race in Wealth Management
	Keramas	Active ETFs for Alternatives
	Vocatus	RIA PR Campaign
	Water & Wall	The Role of Earned Media
PHILANTHROPY		
	Daylight Advisors	Delivering Impact Strategies
	Foundation Source	Client Meeting Kit
	TIFIN Give	AI-Powered Digital Philanthropy Platform
RETIREMENT INCOME		
	Osaic	NextPhase
	PIMCO	Retirement Income Model Portfolios
	TruStage	MyComfortZone
RETIREMENT PLAN SUPPORT AND ADVISOR SERVICES		
401(k) Service	Bryn Mawr Trust	Trust and Wealth as a Service
	John Hancock	Participant Engagement Program
	LeafHouse	Personalized Plan Income Portfolio Technology
	Pontera	Third-party Technology Integrations
	Strategic Retirement Partners	Investment Process and Client Automation
401(k)Technology	Envestnet	Retire Complete
	LeafHouse	Personalized Plan Income Portfolio Technology
	Pontera	Third-party Technology Integrations
	Vestwell	Record-keeping Platform Enhancements
	Voya Financial	myVoyage

Aggregators > CEO of the Year	Alera Group	Christian Mango, EVP and National Retirement Practice Leader
	HUB Retirement and Private Wealth	Joseph DeNoyior, President
	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
	Raymond James	Retirement Plan Advisors and HR Industry Collaboration
DCIO Providers > Advisor Value Added Programs	Franklin Templeton	Voice of the American Workplace
	Morningstar Retirement, Morningstar Investment Management	Personalized Managed IRAs
	Nuveen Investments	Lifetime Income Solutions in Target Date Funds
In-plan Retirement Income - Product or Service	401(k) Annuity Hub	Market Intelligence Service
	Allianz Life Insurance Company of North America	Lifetime Income+ Annuity
	iJoin	Retirement Income Marketplace
	Income America	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 Advisor Support	401GO	Bundled Record Keeping Platform
	Ascensus	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
	The AmeriFlex Group®	Growth Opportunities
TAMPs		
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	Redtail CRM Integration
	SMArtX Advisory Solutions	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
Artificial Intelligence	Alkymi	Alpha Generative AI 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	AI 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
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	Aaron Schumm
	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 Hussain
Client Onboarding / New Account Opening	Advisor360°	Envestnet Integration
	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

	Panoramix	Documents Expire
	Reflect	SEC's Names Rule Software
	RegVerse	Avery
	SIGNiX	Compliance Lock
	Smarsh	Platform Enhancements
	Testimonial iQ	Social Proof Platform
CRM	Interactive Brokers	Cash Management Program
	Orion	Redtail CRM Suite Sync
	Practifi	CRM Evolution
	SS&C Black Diamond Wealth Platform	Purpose-built CRM
Cyber Security	ID-Pal	ID-Detect
	Sequretek	Security for Enterprises
	SIGNiX	Digital Signature Security
Digital Marketing Campaign of the Year	FMG	Holiday Advent Calendar Campaign
	intelliflo	Omnichannel Digital Campaign
	Nitrogen	Riskalyze to Nitrogen Rebrand
	Snappy Kraken	State of Digital Industry Report
	Zephyr	A to Zephyr
Direct Indexing	Alphathena	AI-Enhanced Direct Indexing
	Eaglebrook	Direct Indexing for Crypto
	IMTC	Fixed Income Direct Indexing
	Rowboat Advisors	"Non-armchair Direct Indexing" Education Series
	Vestmark	VAST
Document Management	d1g1t	Document Vault
	FutureVault	Life Management Vault
	illuminote	Digital Asset Registry and Clearinghouse
	Laserfiche	Generative AI-Powered Document Summarization
	Prismm	Next-Gen Secure Document Vault
Estate Planning	EncorEstate Plans	Estate Planning Software
	FP Alpha	The Estate Lab
	Luminary	Estate Planning Software
	Trust & Will	Estate Planning Insights and Dashboard
	Vanilla	Estate Advisory Platform
	Wealth.com	Estate Planning Software
Financial Planning	Asset-Map	Empowering Financial Planning Evolution
	eMoney Advisor	Multi-View in Decision Center
	Orion	PulseCheck
Innovation New Applications	Assetlink	AI Platform
	Couplr AI	Client Acquisition Software
	Jump	AI Meeting Assistant
	NEXA Insights	Key Features
	Sora Finance	Liability Planning and Optimization Software
	Vanilla	Vanilla Scenarios™
Innovation Platforms	BridgeFT	Platform Expansion
	CAIS	CAIS Solutions
	Eaglebrook	Direct Indexing for Crypto
	Envestnet	Wealth Management Platform
	Foundation Source	PhilTech Platform
	illuminote	Digital Asset Registry and Clearinghouse
	Invent	SuperAPP Platform
	Shaping Wealth	Outsourced Chief Behavioral Officer
	Summit Wealth Systems	Client Experience Platform
	YCharts	YCharts Proposals
Marketing Automation	Broadridge Financial	AdvisorStream Salesforce App
	Catchlight	AI Driven Engagement and Lead Conversion
	Snappy Kraken	Marketing Hub
	Testimonial iQ	Unlocking the SEC Marketing Rule for Advisers

	Wealth Management GPT	Lead Gen and Client Engagement
Model Marketplaces	Adhesion Wealth Advisor Solutions	Model Marketplace Manager Exchange
	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 Performance Reporting	Advyzon	Advyzon Conference
	Jacobi	Investment Technology for Asset Owners
	MyVest	Tax-Aware Portfolio Transitions
	Pontera	Third-party Technology Integrations
	SS&C Technologies	Aloha
Rebalancing	Advyzon	Quantum Rebalancer
	Apex Fintech Solutions	AdvisorArch
	Helios	Customizable Rebalancing
	intelliflo	redblack Enhancements
Retirement Income	Broadridge Financial Solutions	Retirement Income Consortium
	IncomePath	Annuity Retirement Income Software
	MyVest	Income Discovery Partnership for Tax-optimized Income in Retirement
	Panoramix	Contributions and Distributions Reporting
	Voyant	Longevity Risk, Disability, and Long-Term Care 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
Specialized Planning Applications	Asset-Map	Asset-Map Updates Drive Future of Financial Planning
	Caribou	Healthcare Planning Software
	Charityvest	Custom-branded Donor-advised Fund
	Daffy	Donor-advised Fund Platform
	FP Alpha	Roth Conversion Simulator
	Holistiplan	Property and Casualty Tool
	Sora Finance	Liability Planning and Optimization Software
	Whealthcare Planning	WhealthBot
Thought Leadership	AdvicePay	Fee-for-Service Industry Trend Report
	Asset-Map	AdviceTech.LIVE
	Dynasty Financial Partners	Advisor to CEO Program
	FMG	Growth Guides
	iCapital	Beyond 60/40, Newsletter and Video Series
	Nitrogen	The Fearless Investing Summit
	Paychex	Financial Advisor Webinar Series
	Rethink Financial Advice	Rethink Podcast
	Shaping Wealth	Building the Behavioral Advisor
	Zephyr	A to Zephyr Podcast
Unified (All-In-One) Systems	Amplify Technology	Client Dashboard
	Envestnet	Wealth Management Ecosystem
	Orion	Orion Systems Integration
	Pershing X	Wove
	SS&C Black Diamond Wealth Platform	Platform Integrations
TRUSTS		
	Bank of America Private Bank	Accelerating the Client and Advisor Trust Acceptance Experience
	Fiduciary Trust of New England	New Hampshire Trust: Enhancing Accessibility
	Hallman & Associates, PC	Deferred Sales Trust

	SS&C Advent	Trust Suite
	The Private Trust Company, N.A. an affiliate of LPL Financial	Estate Settlement Service
	Wealth.com	Ester™