

[YOUR LOGO]

FOR IMMEDIATE RELEASE

[Your Firm] is Named a Finalist in the Wealth Management 2025 Industry Awards for [Award Category(ies)]

CITY, STATE (June XX, 2025) — [Your firm], [brief firm description], announced today that it has been named a Finalist in the Wealth Management 2025 Industry Award (the “Wealthies”) for [category(ies)].

[Describe the winning initiative or individual in this paragraph.]

“We’re honored to receive this prestigious award from WealthManagement.com,” said [Name and Title]. “[Insert additional quote about the individual or initiative and the team behind it].”

[Mention other previous awards you may have received, if applicable.]

Now in its 11th year, the Wealth Management Industry Awards is the only awards program of its kind to honor outstanding achievements by companies, organizations and individuals that support financial advisor success.

A panel of judges made up of top names in the industry, led by WealthManagement.com director of editorial strategy and operations David Armstrong, chose the finalists and will determine the winners, which each year recognizes the firms and

individuals who are bringing new innovations to market that make a real difference to the daily activities of financial advisors. Winners will be announced at a gala and awards ceremony in New York City on September 4th.

“The Industry Awards are a beacon, illuminating the trailblazers and innovators who are shaping the future of the financial services industry,” said David Armstrong, director of editorial strategy and operations. “They serve as a leading indicator of future activity, and as a barometer for the dynamic ecosystem of companies and organizations that empower, support and enable advisor success who are driving the industry forward.”

About [Your Firm]

[Insert boilerplate language from your firm here]

About WealthManagement.com

WealthManagement.com, an Informa business, provides everything wealth professionals need to know to stay knowledgeable about the industry, build stronger relationships, improve their practice, and grow their business. WealthManagement.com offers financial services organizations a broad array of marketing services designed to help them influence the industry’s leading audience of wealth management professionals.