Wealth Management Industry Awards
by informa

# 2026 Program
# INITIATIVES
# Nomination Categories/Subcategories: 100

New category for 2025

**ASSET MANAGERS**

- Alternative Investments
- Client Experience Initiative
- Digital Marketing Campaign of the Year
- Direct Indexing
- ETFs
- Fixed Income
- Goals-based Investing Platforms
- Models Portfolio Selection
- New Product Development
- Portfolio Construction
- Real Estate (including REITs)
- Separate Accounts
- Thought Leadership

**BROKERS/DEALERS (1,000 Advisors or More)**

- Digital Marketing Campaign of the Year
- Practice Management
- Service
- Technology
- Thought Leadership
- Transition Support

**BROKERS/DEALERS (Fewer Than 1,000 Advisors)**

- Digital Marketing Campaign of the Year
- Practice Management
- Service

- **Technology**
- **Thought Leadership**
- **Transition Support**

**COMPLIANCE/LAW FIRMS**

**CORPORATE SOCIAL RESPONSIBILITY**

**CUSTODIANS**

- **Alternative Asset**
- **Digital Marketing Campaign of the Year**
- **Practice Management**
- **Technology**
- **Thought Leadership**
- **Transition Support**

**DISTRUPTORS**

- **Industry**
- **Technology**

**DIVERSITY, EQUITY AND INCLUSION**

**ENTERPRISE INNOVATION**

**ESTATE PLANNING**

- **Advisor Service and Support**
- **Implementation**
- **Technology**
- **Thought Leadership**
- **Trusts**

**FAMILY OFFICES**

- **Client Initiative**
- **Thought Leadership**

**INDIVIDUAL RIA FIRMS**

- **Client Initiatives**

**INDUSTRY ASSOCIATIONS**

**INDUSTRY RESEARCH PROVIDERS**

**INSURANCE**

**M&A DEAL SUPPORT**

**MARKETING/PR FIRMS**

- **Client Digital Campaign of the Year**
- **Client PR Campaign of the Year**

**PHILANTHROPY**

**PODCASTS**

- **Industry Focused**
- **Investor Focused**

**RECRUITERS**

- **Independent Recruiting Firm of the Year**

**RETIREMENT INCOME**

**RETIREMENT PLAN SUPPORT AND ADVISOR SERVICES**

- **401(k) Technology**
- **Advisor Support: Aggregators**
- **Advisor Support: Broker-Dealers**
- **Advisor Support: DCIO Providers**
- **Advisor Support: Recordkeepers**
- **Advisor Support: Third Party Administrators**
- **Convergence – Wealth and Retirement Integration**

**TAMPs**

- **Model Marketplaces**
- **TAMPs**

**TECHNOLOGY PROVIDERS**

- **Account Aggregation**
- **Advisor Intelligence Platforms**
- **Alternative Investment Platforms**
- **Artificial Intelligence: Marketing and Lead Generation**
- **Artificial Intelligence: Meeting Support**
- **Artificial Intelligence: Workflow Automation**
- **Business Support Systems**
- **Cash Optimization**
- **Client Onboarding/New Account Opening**
- **Client Portals**
- **Compliance**
- **CRM**

- **Cyber Security**
- **Data Lakes/Warehouses**
- **Digital Marketing Campaign of the Year**
- **Direct Indexing**
- **Document Management**
- **Financial Planning**
- **Innovation New Applications**
- **Innovation Platforms**
- **Marketing Automation**
- **Model Marketplaces**
- **Outsourcing Platforms (Wealth as a Service)**
- **Portfolio Analytics**
- **Portfolio Management, Accounting and Performance Reporting**
- **Rebalancing**
- **Retirement Income Technology**
- **Risk Tolerance/Client Profiling**
- **Securities-based Lending**
- **Specialized Planning Applications**
- **Thought Leadership**
- **Unified (all-in-one) Systems**

**UNIVERSITY CFP PROGRAMS**

**VIDEO SERIES**