



#PAMAwards

SHORTLIST

FAMILY OFFICE SERVICE PROVIDER AWARDS

Best Family Office Service Provider - New Innovations

- Aston Pearl
- Berdon
- BNY Mellon | Pershing (Digital Authorizations)
- BNY Mellon | Pershing (Site Builder Solutions)
- CAIS
- Canoe Intelligence
- Facteus
- FIS
- PKF O'Connor Davies Family Office
- Stone Mountain Capital

Best Technology Platform for Family Offices

- 280 CapMarkets
- Canoe Intelligence
- Citi Private Bank
- DealCloud
- Envestnet

FIS

Foreside

Profile Software

Risclarity

Best Asset Manager Solutions for Family Offices

Alpha Growth Capital, subsidiary of MNT-V GmbH

Capital Counsel

Capital Dynamics

GoldenTree Asset Management

Owl Rock Capital Partners

ProAlpha Capital

Turning Rock Partners

Best Business Consulting Firm for Family Offices

ECG Resources

F2 Strategy

Mack International

PKF O'Connor Davies Family Office

Turnkey Trading Partners

ProAlpha Capital

Turning Rock Partners

Best Custodian

BNY Mellon | Pershing

Charles Schwab

Fidelity Family Office Services

Fiduciary Trust Company

Northern Trust

RBC Wealth Management

State Street

Best Fiduciary/Trustee Service

Ascent Private Capital Management of U.S. Bank

Fiduciary Trust Company

Key Private Bank

The Family Office at Synovus

Best Firmwide Security Solution

Blackcloak

Drawbridge

Eze Castle Integration

Hillard Heintz

Summitas

Best Fund Administration Service

Citco Institutional Services
PKF O'Connor Davies Fund Administration
SS&C Technologies
Sudrania Fund Services

Best General Ledger System

Burgher Haggard
FundCount
Private Wealth Systems
SEI Family Office Services
Sudrania Fund Services

Best High-Net-Worth Insurance Solution

Alliant Insurance Service
BKS Partners
Chubb
HUB International
PURE Insurance

Best Law Firm - Estates and Trusts

Day Pitney
Handler Thayer
Ropes & Gray Private Client
Withers Bergman

Best Lifestyle Management Firm

Abernathy Group Family Office
Black Bag
JDJ Family Office Services
Pall Mall Art Advisors
Smith & Howard
Teresa Leigh

Best Multi-Asset Class Portfolio Management System

Addepar
Asset Vantage
FundCount
MyVest
Private Wealth Systems
Solovis
SS&C Advent

Best Outsourced CIO

Cambridge Associates
Keystone Global Partners
Russell Investments
The Family Office at Synovus
TIFF

Best Partnership Accounting System

Asset Vantage
FundCount
PKF O'Connor Davies Family Office
Private Wealth Systems
Sudrania Fund Services

Best Reporting Solution

Ascent Private Capital Management of U.S. Bank
Asset Vantage
BMO Family Office
BNY Mellon | Albridge
Brown Advisory
Burgher Haggard
Mirador
Private Wealth Systems
Risclarity

FAMILY OFFICE/PRIVATE WEALTH MANAGER AWARDS

Manager or Investment Research Professional of the Year

Anna Snider, Managing Director, Merrill Lynch Wealth Management
Bill Andrakakos, Chief Investment Officer, Aaron Wealth Advisors
Brooks Friederich, Senior Vice President and Director of Research Strategy, Envestnet | PMC
Gene Goldman, Chief Investment Officer, Cetera Financial Group
Greg Maddox, Head of Global Manager Research, Wells Fargo Investment Institute
Greg Trinks, Head of Investment Management Research, UBS Wealth Management
Jeff DeMaso, Director of Research, Adviser Investments
Megan Horneman, Director of Portfolio Strategy, Verdence Capital Advisors
Ronald J. Smolenski, Jr., Managing Director of Investment Research, Pitcairn
Shannon Saccocia, Chief Investment Officer, Boston Private
Stacy Haislip, Director of Portfolio Management, TAG Associates
Tricia Bannan, Head of Equities, CIBC Private Wealth

Best Private Wealth Manager - Performance

Cadence Bank Trust & Asset Management

Capital Counsel

CIBC Private Wealth

Best ESG Investment Offering

Aaron Wealth Advisors

Mercer Advisors

Pathstone

RBC Wealth Management

UBS Global Wealth Management

Best High-Net-Worth Investment Platform

6 Meridian

CIBC Private Wealth

Citi Private Bank

Cresset Asset Management

Best Family Office - New Innovations

Northland Wealth Management

PKF O'Connor Davies Family Office

Best Multi-Family Office Over \$10bn

Ascent Private Capital Management - U.S. Bank

CIBC Private Wealth

Cresset Asset Management

JDJ Family Office Services

Key Family Wealth

Pathstone

PKF O'Connor Davies Family Office

Tiedemann Advisors

Best Multi-Family Office \$2bn to \$10bn

Camden Capital

Coastal Bridge Advisors

Pitcairn

The Family Office at Synovus

Best Multi-Family Office Under \$2bn

Keystone Global Partners

Market Street Trust Company

Northland Wealth Management

True North Advisors

Best Private Wealth Manager Under \$5bn - Client Service

Coastal Bridge Advisors

Keystone Global Partners

Northland Wealth Management

Best Private Wealth Manager Over \$5bn - Client Service

Ascent Private Capital Management - U.S. Bank

Boston Private

CIBC Private Wealth

Fiduciary Trust Company

First Republic

Mercer Advisors

Private Wealth Manager M&A deal of the Year

Allworth Financial

Captrust

Cresset Asset Management

Fiduciary Trust

Mercer Advisors

Procyon Partners

Rockefeller Capital Management

Best Impact Investment Offering

Citi Private Bank

Envestnet

The Family Office at Synovus

Tiedemann Advisors

UBS Global Wealth Management

Best Firm Culture - Wealth Management Smaller Firms

6 Meridian

Bailard

Pitcairn

Procyon Partners

Your Wealth Effect

Best Firm Culture - Wealth Management Larger Firms

BMO Family Office

Carson Group

First Republic

Huntington Private Bank

JDJ Family Office Services

Best Estate Planning Advisory Service

BMO Family Office
Citi Private Bank
Fiduciary Trust Company
The Family Office at Synovus
Tiedemann Advisors
Wells Fargo Wealth and Investment Management

Best Family Office - Due Diligence Processes

Balentine
Forbes Family Trust
Northland Wealth Management
TAG Associates
WE Family Office

Best Family Office Long-Term Investment Philosophy

Cresset Asset Management
Key Family Wealth
Pitcairn
TAG Associates
The Family Office at Synovus

OVERALL AWARDS & PRIVATE BANKING AWARDS

Best Philanthropic/Educational Initiative

Bailard
CAIS
Envestnet
Fidelity Family Office Services
Foundation Source
Mercer Advisors
The Family Office at Synovus

Women in Wealth Advocate of the Year (firm)

6 Meridian
Mack International
Mercer Advisors

Women in Wealth Advocate of the Year

Halé Behzadi, Citi Private Bank
Katherine Relle, J.P. Morgan Asset Management

Linda Mack, Mack International

Margaret Dechant, 6 Meridian

Teri Shepherd, Carson Group

ESG Advocate of the Year

280 CapMarkets

Bailard

Capital Dynamics

Jay Lipman, Ethic

Jeff Fitterman, Gitterman Wealth Management

Mercer Advisors

Lifetime Achievement Award

Darrell Hackett, BMO Wealth Management

Handley Thayer, Handler Thayer

Larry Swedroe, Buckingham Wealth Partners

Ron Carson, Carson Group

Scott Caven, CIBC

Private Banking - Client Service

Bank of America Private Bank

CIBC Private Wealth

Citi Private Bank

First Republic Bank

Key Private Bank

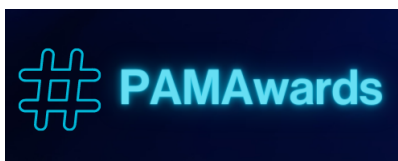
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