

(https://pamawards.awardstage.com/#Shortlist_2020)

SHORTLIST ANNOUNCED!

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The PAM Awards have returned for 2020 to recognize the top investment professionals, wealth advisers, legal firms, consultants and other key service providers in the private asset management space.

The prestigious Awards ceremony will take place on **Thursday, February 6, 2020, at 583 Park Avenue, New York.**

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Celebrating the top-performing elite of the private wealth community

Often regarded as the "Oscars" of the US private asset management industry, the highly sought after PAM Awards for over two decades have provided a platform for top investment professionals, wealth advisors, legal firms, consultants and other key service providers operating within the sector, to showcase the incredible achievements they have accomplished. Winning a PAM Award is a true seal of approval from the private wealth community to one of its own.

The annual Awards ceremony will take place on **Thursday, February 6, 2020 at 583 Park Avenue, New York.**

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TESTIMONIALS

“

Recognition by peers adds **credibility** when presenting to families, advisors, and operating professionals, and PAM's widespread recognition within the wealth industry extends and **enhances our brand presence.**

For team building and workplace satisfaction, our people are motivated when they see their hard work **recognized by experts.** ”

- William S. Wyman
CEO
Summitas, LL
2019 PAM Awards winner

“

Winning a prestigious **PAM Award** was a **terrific testament** to all the hard work and efforts of the Dynasty team and our Network. It was greatly valued, both internally and as a **badge of excellence** we could display to clients and future prospects.

The fact that these awards are judged by a **broad and diverse** range of experts across the private wealth space, and have such a strong **tradition and reputation**, means they are a win that is well respected. ”

- Gordy Abel
Managing Director & Chief Marketing Officer
Dynasty Financial Partners
2019 PAM Awards winner

“ We happily and humbly accepted the “Best New High Net Worth Advisory Product” at the PAM Awards 2019 in February.

The PAM award has helped to **validate the work of the past 15 years** and the association with the PAM brand has **helped to raise our profile** in a very distinguished manner. We were gratified to meet the **high standards** established by PAM and the judges. The quality and integrity of the other entrants and award winners has helped establish Millennium Bridge's place **among the very best of the industry.** ”

- John Pileggi
Senior Advisor
Millenium Bridge Capital
2019 PAM Awards winner

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SHORTLIST 2020

Category	Finalists
Best asset manager solution for family offices	Stone Mountain Capital

	Capital Dynamics
	Capital Counsel
	Grayscale Investments
	Fiera Capital
	GoldenTree Asset Management
Best business consulting firm for family offices	Mack International
	PKF O'Connor Davies Family Office
	Berdon
	F2 Strategy
	Pepper International
Best compliance consulting firm	Foreside
	SCA
	Asena Advisors
	Oyster Consulting
Best custodian	Fiduciary Trust Company
	Fidelity Family Office Services
	Northern Trust
	BNY Mellon Wealth
Best document/content management service or tool	Seismic
	Summitas
	LaserFische
	Worldox
Best estate planning advisory service	Tiedemann Advisors
	Key Family Wealth
	CIBC Private Wealth Management
	Fiduciary Trust Company
	Citi Private Bank
Best family office - due diligence processes	Algonquin Advisors
	TAG Associates

	Northland Wealth Management
	Massey Quick Simon & Co.
	Forbes Family Trust
Best family office long-term investment philosophy	Algonquin Advisors
	Forbes Family Trust
	Massey Quick Simon & Co.
	Northland Wealth Management
Best family office new innovation	Cresset
	PKF O'Connor Davies Family Office
	Risclarity
	Proteus LLC
Best family office succession/continuity plan	JDJ Family Office Services
	PKF O'Connor Davies Family Office
	The Family Office at Synovus
Best fiduciary/trustee service	Tiedemann Trust Company
	Fiduciary Trust Company
	Hawthorn, PNC Family Wealth
	Argent Financial Group
	Ropes & Gray Private Client Group
	Boston Private
Best firm culture - wealth management larger firms	JDJ Family Office Services
	First Republic Private Wealth Management
	Pitcairn
	Carson Group
	Massey Quick Simon & Co.
	BMO Family Office
Best firm culture - wealth management smaller firms	Your Wealth Effect
	Rose Capital Advisors

	Westmount Asset Management
	Massey Quick Simon & Co
Best firmwide security solution	Summitas
	Kroll
	ESentire
	CloudJacketX
	Carbon Black
	Depth Security
Best fund administration service	Private Wealth Systems
	PKF O'Connor Davies Family Office
	CITCO Institutional Services
Best general ledger system	FundCount
	Private Wealth Systems
	TAG Bill Pay
Best high-net-worth insurance broker	Brown & Brown Insurance
	HUB International
	Willis Towers Watson
	Crystal, Alliant Private Client - A Division of Alliant Insurance Services
	Baldwin Krystyn Sherman Partners
Best high-net-worth insurance company	AIG
	Huntington T Block
	Chubb
	PURE Insurance
Best HNW investment platform	Stone Mountain Capital Ltd
	CIBC Private Wealth Management
	Citi Private Bank
	Envestnet
Best law firm - estates and trusts	Handler Thayer
	Day Pitney
	Withersworldwide

	Ropes & Gray Private Client Group
Best lifestyle management firm	JDJ Family Office Services
	Black Bag
	Ronald Varney Fine Art Advisors
	Pall Mall Art Advisors
Best multi asset class portfolio management system	SS&C Advent - Advent Portfolio Exchange
	Solovis
	MyVest
	FundCount
	Private Wealth Systems
Best multi-family office over \$10bn	JDJ Family Office Services
	PKF O'Connor Davies Family Office
	Key Family Wealth
Best multi-family office over \$2bn	The Family office at Synovus
	Forbes Family Trust
	Pitcairn
	Fieldpoint Private
	Massey Quick Simon & Co.
	Coastal Bridge Advisors
Best multi-family office under \$2bn	Algonquin Advisors
	Market Street Trust Company
	Keystone Global Partners
	Northland Wealth Management
	Rose Capital Advisors
Best outsourced CIO	Algonquin Advisors
	Envestnet
	The Family Office at Synovus
	Keystone Global Partners
	Key Family Wealth
Best partnership accounting system	FundCount

	Private Wealth Systems
	PKF O'Connor Davies Family Office
Best philanthropic/educational initiative	Cresset
	Argent Financial Group
	PKF O'Connor Davies Family Office
	Fidelity Family Office Services
	Jewish Communal Fund
Best private wealth manager over \$5bn - client service	Mercer Advisors
	Fiduciary Trust Company
	Key Private Bank
	CIBC Private Wealth Management
	First Republic Private Wealth Management
	Forbes Family Trust
Best private wealth manager over \$5bn - performance	CIBC Private Wealth Management
	Mercer Advisors
	Key Private Bank
	CIBC Private Wealth Management
	Forbes Family Trust
Best private wealth manager under \$5bn - client service	Fieldpoint Private
	Capital Counsel Investment Advisers
	Keystone Global Partners
	Coastal Bridge Advisors
	Massey Quick Simon & Co
	Accretive Capital Partners
Best private wealth manager under \$5bn - performance	Fieldpoint Private
	Capital Counsel Investment Advisers
	Key Private Bank
	Rose Capital Advisors

 Accretive Capital Partners

Best reporting solution

 Mirador

 BNY Mellon Pershing

 Addepar

 Private Wealth Systems

 PKF O'Connor Davies Family Office

 Risclarity

Best technology platform for family offices

 Summitas

 Carson Group

 DarcMatter

 CAIS

 PKF O'Connor Davies Family Office

 Risclarity

 Envestnet

ESG Advocate of the Year

 Ethic

 The Family Office at Synovus

 Mercer Advisors

 Envestnet

 Boundless Impact Investing

 Dynasty Financial Partners

 CIBC Private Wealth Management

 The S Factor

Lifetime achievement award**To be announced on the night****Private banking - client service**

 Stone Mountain Capital

 Key Private Bank

 First Republic Bank

	PNC Wealth Management
	Citi Private Bank
Private banking - consulting/specialized solutions	UBS Global Family Office
	Northern Trust
	CIBC Private Wealth Management
	Key Family Wealth
Private banking - innovation	Fieldpoint Private
	First Rrepublic Bank
	Citi Private Bank
Private wealth management M&A deal of the year	Cresset
	Mercer Advisors
	Procyon Partners
	Clarfeld Citizens Private Wealth
Women in Wealth Advocate of the Year	Linda Mack, Mack International
	Teri Shepherd, Carson Group
	Ida Lio, Citi Private Bank
Women in Wealth Advocate of the Year firm	Mercer Advisors
	Fifth Third Bank
	CIBC Private Wealth Management
	Citi Private Bank

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2020 JUDGING PANEL

