

PAM Awards 2014

October 22nd, 2013

6:30pm, Monday February 24, 2014

583 Park Avenue, New York

Rewarding excellence and innovation in Private Asset Management

Private Asset Management are delighted to announce the shortlist for the PAM Awards 2014:

Wealth Management Categories:

Best private wealth manager – performance – under \$5bn

Accretive Capital Partners
Algonquin Advisors
Constellation Wealth Advisors
Pathstone Family Office
SEI Private Wealth Management

Best private wealth manager – performance – over \$5bn

Atlantic Trust
Brown Advisory
Brown Brothers Harriman
Harris Associates

Best private wealth manager – client service – under \$5bn

Banyan Partners
Constellation Wealth Advisors
HSW Advisors, HighTower
Keystone Global Partners
LLBH Private Wealth Management
SEI Private Wealth Management
Traust Sollus Wealth Management

Best private wealth manager – client service – over \$5bn

Ascent Private Capital Management of U.S. Bank
Aspiriant
Atlantic Trust
Brown Brothers Harriman
Convergent Wealth Advisors
CTC Consulting | Harris myCFO
Tiedemann Wealth Management

Best private wealth manager – under \$5bn

Accretive Capital Partners
Clear Harbor Asset Management
Constellation Wealth Advisors
HSW Advisors, HighTower
LLBH Private Wealth Management
Sanctuary Wealth Services
SEI Private Wealth Management
Traust Sollus Wealth Management

Best private wealth manager – over \$5bn

Ascent Private Capital Management of U.S. Bank
Aspiriant
Atlantic Trust
Brown Advisory
Brown Brothers Harriman
Convergent Wealth Advisors
First Republic Bank
Tiedemann Wealth Management

Best private wealth manager – new product

Atlantic Trust
Bank of the West
Traust Sollus Wealth Management

Private banking – North America

Bank of America U.S. Trust
Bank of the West
Brown Brothers Harriman
Citi Private Bank
First Republic Bank
Merrill Lynch Wealth Management, Private Banking & Investment Group
Northern Trust

Private banking – client service

Bank of America U.S. Trust
Brown Brothers Harriman
Citi Private Bank
Northern Trust
Yapi ve Kredi Bankası A.Ş.

Private banking – innovation

Northern Trust
Pershing Advisor Solutions
Private Client Resources
WealthTouch
Yapi ve Kredi Bankası A.Ş.

Private banking – new product

Bank of America U.S. Trust
Bank of the West
Emigrant Bank/New York Private Bank & Trust
Pershing Advisor Solutions

Private banking – overall

Bank of America U.S. Trust
Bank of the West
Citi Private Bank
Emigrant Bank/New York Private Bank & Trust
First Republic Bank
Merrill Lynch Wealth Management, Private Banking & Investment Group

Best wealth manager – long-term performance (3 years)

Accretive Capital Partners
Brown Advisory
Brown Brothers Harriman
Constellation Wealth Advisors

Private client investment platform – client service

Ascent Private Capital Management of U.S. Bank
Brown Brothers Harriman
Dynasty Financial Partners
Independence by Convergent
InvestEdge
Keystone Global Partners
Tiedemann Wealth Management

Private client investment platform – performance

Brown Advisory
Brown Brothers Harriman
CTC Consulting | Harris myCFO
Neuberger Berman

Private client investment platform – innovation

Bank of the West
Dynasty Financial Partners
Independence by Convergent
InvestEdge
Keystone Global Partners
Tiedemann Wealth Management

Private client investment platform – new product

Dynasty Financial Partners
InvestEdge
Trov

Best trustee services

Atlantic Trust
Bank of America U.S. Trust
Brown Brothers Harriman
Northern Trust
Wealth Advisors Trust Company

Best multi-family office – client service – under \$2.5bn

Banyan Partners
Forbes Family Trust
HAGIN Investment Management
Keystone Global Partners
LLBH Private Wealth Management
Market Street Trust Company
Pepper International
WE Family Offices

Best multi-family office – client service – over \$2.5bn

Ascent Private Capital Management of U.S. Bank
Atlantic Trust
CTC Consulting | Harris myCFO
Geller & Company
GenSpring Family Offices

Best multi-family office – overall – under \$2.5bn

Banyan Partners
Forbes Family Trust
HAGIN Investment Management
Keystone Global Partners
LLBH Private Wealth Management
Pepper International

Best multi-family office – overall – over \$2.5bn

Ascent Private Capital Management of U.S. Bank
Atlantic Trust
CTC Consulting | Harris myCFO
GenSpring Family Offices
Hawthorn, PNC Family Wealth

Best multi-family office – overall – new product

Atlantic Trust
Forbes Family Trust
Hawthorn, PNC Family Wealth
Keystone Global Partners
LLBH Private Wealth Management
Pathstone Family Office

Best single family office service provider

Northern Trust
Pepper International
Private Client Resources
Summitas
Teresa Leigh Household Risk Management

Best multi-family office service provider

Ascent Private Capital Management of U.S. Bank
Atlantic Trust
Banyan Partners
CTC Consulting | Harris myCFO
Fidelity Family Office Services
Pershing Advisor Solutions
Teresa Leigh Household Risk Management
The Rothstein Kass Family Office Group, Rothstein Kass

Best newcomer – private wealth manager

AM Global Family Investment Office
Madeira Global
Poliwogg
Yapi ve Kredi Bankası A.Ş.

Legal Categories:

Best law firm – private client

Cantor & Webb

Gibney, Anthony & Flaherty

Handler Thayer

Holland & Knight

Withers Bergman

Best law firm – client service

Handler Thayer

Holland & Knight

Lowenstein Sandler

Best overall law firm

Handler Thayer

Holland & Knight

Lowenstein Sandler

Withers Bergman

Advisory categories:

Best family office consulting firm

Aston Pearl

Baker Currie Global

graymatter Strategies

Mack International

Pepper International

Winston Art Group

Best technology platform

Advent Software

Charles River Development

Equipos

InvestEdge

Private Client Resources

Rockit Solutions

SunGard

Trov

Best reporting solution

Advent Software

Equipos

InvestEdge

Private Client Resources

WealthTouch

Best philanthropic/educational initiative

Philanthropy Indaba

Strategic Philanthropy

Yapi ve Kredi Bankası A.Ş.

Best lifestyle firm

Aston Pearl

Black Bag

Cassford Management

Lifestylist Advisory

Teresa Leigh Household Risk Management

Best high-net-worth insurance company

ACE Private Risk Services

AIG (Private Clients)

Privilege Underwriters Reciprocal Exchange (PURE)

Synergy Life Brokerage Group

Best high-net-worth insurance broker

Crystal & Company

HUB International Personal Insurance

Marsh Private Client Services

Personal Risk Management Solutions

York International Agency

Best wealth solution

graymatter Strategies

Tiedemann Wealth Management

Winston Art Group