



# Rewarding excellence & innovation

in private asset management

February 2, 2015

Cipriani 42nd Street, NY

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## Shortlist

Here is the shortlist for the 2015 Awards.

Wealth Management Categories	
<b>Best fund product for HNW clients - NEW</b>	Accretive Capital Partners AM Global Family Investment Office Canid Asset Management Kayne Anderson Rudnick New York Private Bank & Trust Spruce Investment Advisors
<b>Best liquid alternatives solution</b>	Canid Asset Management Citi Invesco Neuberger Berman
<b>Best multi-family office - client service - over \$2.5bn</b>	Ascent Private Capital Management of U.S. Bank Aspiriant Atlantic Trust CTC   myCFO Fieldpoint Private Forbes Family Trust Hawthorn,PNC Family Wealth
<b>Best multi-family office - client service - under \$2.5bn</b>	BP Wealth Management Camden Capital Delegate Advisors Keystone Global Partners LLBH Private Wealth Management Market Street Trust Company Northland Wealth Management
<b>Best multi-family office - overall - new product</b>	Atlantic Trust Forbes Family Trust Hawthorn,PNC Family Wealth LLBH Private Wealth Management New York Private Bank & Trust Spruce Investment Advisors
<b>Best multi-family office - overall - over \$2.5bn</b>	Ascent Private Capital Management of U.S. Bank Atlantic Trust Ballentine Partners CTC   myCFO

	<p>Fiduciary Trust Company International  Fieldpoint Private  Forbes Family Trust  Hawthorn,PNC Family Wealth</p>
<p><b>Best multi-family office - overall - under \$2.5bn</b></p>	<p>BP Wealth Management  Inverness Counsel  Keystone Global Partners  LLBH Private Wealth Management  Market Street Trust Company  New York Private Bank &amp; Trust  Waldron Private Wealth</p>
<p><b>Best multi-family office service provider</b></p>	<p>Ascent Private Capital Management of U.S. Bank  Ballentine Partners  BP Wealth Management  FFO (Flynn Family Office)  Fiduciary Trust Company International  Hawthorn,PNC Family Wealth  Pershing Advisor Solutions , a BNY Mellon company  PPB Advisors</p>
<p><b>Best newcomer - private wealth manager</b></p>	<p>Delegate Advisors  Keystone Global Partners  Northland Wealth Management  Waldron Private Wealth</p>
<p><b>Best private wealth manager - client service - over \$5bn</b></p>	<p>Ascent Private Capital Management of U.S. Bank  Aspiriant  Atlantic Trust  Brown Brothers Harriman  Constellation Wealth Advisors  Convergent Wealth Advisors  First Republic Private Wealth Management  Tiedemann Wealth Management</p>
<p><b>Best private wealth manager - client service - under \$5bn</b></p>	<p>Beekman Wealth Advisory  Forbes Family Trust  HSW Advisors, HighTower  Keystone Global Partners  LLBH Private Wealth Management  SEI  WE Family Offices</p>
<p><b>Best private wealth manager - new product</b></p>	<p>Algonquin Advisors  Atlantic Trust  Forbes Family Trust  Kayne Anderson Rudnick  LLBH Private Wealth Management  Spruce Investment Advisors  United Capital Financial Advisers</p>
<p><b>Best private wealth manager - over \$5bn</b></p>	<p>Ascent Private Capital Management of U.S. Bank  Atlantic Trust  Brown Advisory  Brown Brothers Harriman  Capital Group Private Client Services  First Republic Private Wealth Management  Kayne Anderson Rudnick  Tiedemann Wealth Management</p>

<b>Best private wealth manager - performance - over \$5bn</b>	Brown Advisory Brown Brothers Harriman Constellation Wealth Advisors CTC   myCFO Harris Associates Kayne Anderson Rudnick
<b>Best private wealth manager - performance - under \$5bn</b>	Accretive Capital Partners Algonquin Advisors Keystone Global Partners Spruce Investment Advisors
<b>Best private wealth manager - under \$5bn</b>	Accretive Capital Partners Fieldpoint Private Forbes Family Trust HSW Advisors, HighTower Inverness Counsel Keystone Global Partners LLBH Private Wealth Management SEI
<b>Best RIA for HNW advisory - NEW</b>	AM Global Family Investment Office Aspiriant Camden Capital Fusion Family Wealth. Independence by Convergent (a division of Convergent Wealth Advisors) Inverness Counsel  Northland Wealth Management Waldron Private Wealth
<b>Best single family office service provider</b>	Cassford Mangement Archway Technologies FFO (Flynn Family Office) Pathstone Famililt Office Private Client Resources WE Family Offices
<b>Best trustee services</b>	Capital Group Private Client Services Fiduciary Trust Company International U.S. Trust Wealth Advisors Trust Company
<b>Best wealth manager - long term performance (3 years)</b>	Accretive Capital Partners Ballentine Partners Brown Brothers Harriman Harris Associates Kayne Anderson Rudnick
<b>Private banking - client service</b>	Ascent Private Capital Management of U.S. Bank Bank of the West Boston Private Bank & Trust Company Brown Brothers Harriman Citi Private Bank First Republic Bank U.S. Trust
<b>Private banking - innovation</b>	Bank of the West New York Private Bank & Trust Pershing Advisor Solutions , a BNY Mellon company Private Client Resources

	Wise Counsel Research
<b>Private banking - new product</b>	Bank of the West Boston Private Bank & Trust Company First Republic Bank New York Private Bank & Trust
<b>Private banking - North America</b>	Bank of the West Boston Private Bank & Trust Company Brown Brothers Harriman Citi Private Bank First Republic Bank
<b>Private banking - overall</b>	Bank of the West Boston Private Bank & Trust Company Brown Brothers Harriman Citi Private Bank  First Republic Bank  Pershing Advisor Solutions , a BNY Mellon company U.S. Trust
<b>Private client investment platform - client service</b>	Ascent Private Capital Management of U.S. Bank Brown Brothers Harriman Dynasty Financial Partners Independence by Convergent (a division of Convergent Wealth Advisors) InvestEdge Keystone Global Partners Where Americans are Welcome
<b>Private client investment platform - innovation</b>	CTC   myCFO Dynasty Financial Partners InvestEdge Keystone Global Partners New York Private Bank & Trust Tiedemann Wealth Management WealthSite Inc. Where Americans are Welcome
<b>Private client investment platform - new product</b>	Spruce Investment Advisors Wealth Advisors Trust Company WealthSite Inc.
<b>Private client investment platform - performance</b>	Brown Brothers Harriman CTC   myCFO Spruce Investment Advisors
<b>Advisory Categories</b>	
<b>Best family office consulting firm</b>	Atrato Advisors Baker Aurora Cassford Mangement Family Office Metrics Insite Security Inc. Mack International Winston Art Group
<b>Best high-net-worth insurance broker</b>	Baldwin Krystyn Sherman Partners Crystal & Company Frenkel & Company HUB International Personal Insurance Marsh Private Client Services

	NEBCO Insurance Services Personal Risk Management Solutions
<b>Best high-net-worth insurance company</b>	ACE Private Risk Services AIG (Private Clients) Chubb Group of Insurance Companies Privilege Underwriters Reciprocal Exchange (PURE)
<b>Best lifestyle firm</b>	Black Bag Cassford Mangement Convergent Wealth Advisors - Lifestyle Independence by Convergent (a division of Convergent Wealth Advisors) - Lifestyle Lifestylist Advisory Teresa Leigh Household Risk Management Winston Art Group
<b>Best philanthropic/educational initiative</b>	Foundation Source Hawthorn,PNC Family Wealth Inverness Counsel LLBH Private Wealth Management Wise Counsel Research -- Outstanding Contribution -- Thought Leadership
<b>Best reporting solution</b>	Advent Software Archway Technologies Envestnet   Tamarac Envestnet, Inc. InvestCloud InvestEdge Private Client Resources WealthSite Inc.
<b>Best technology platform</b>	Axial Archway Technologies CAIS Charles River Development Private Client Resources Summitas SunGard United Capital Financial Advisers
<b>Best wealth solution</b>	CAIS Hawthorn,PNC Family Wealth InvestCloud Kayne Anderson Rudnick Personal Risk Management Solutions SS&C Technologies, Inc. Winston Art Group
<b>Legal Categories</b>	
<b>Best law firm - private client</b>	Cantor & Webb P.A. Handler Thayer Lowenstein Sandler Withers Bergman
<b>Best law firm - client service</b>	Cantor & Webb P.A. Handler Thayer Lowenstein Sandler Withers Bergman
<b>Best overall law firm</b>	Cantor & Webb P.A.

Handler Thayer  
Lowenstein Sandler  
Withers Bergman

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#### Event Times

**February 02 2015**

18.30 -23.30

**Cipriani 42nd St, New York**

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