



Rewarding
excellence
& innovation
in private asset management

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

Bank of the West Wealth
Management

Boston Private

Citi Private Bank

Evercore Wealth Management

Hawthorn, PNC Family Wealth

Key Private Bank

Best private wealth manager – over \$5bn

Ascent Private Capital
Management of U.S. Bank

Aspiriant

Atlantic Trust Private Wealth

Brown Brothers Harriman

Citi Private Bank

Fiduciary Trust Company

First Republic Private Wealth
Management

Tiedemann Wealth
Management

Best private wealth manager - overall

Aspiriant

	Atlantic Trust Private Wealth
	Brown Brothers Harriman
	Fiduciary Trust Company
	Forbes Family Trust
	Keystone Global Partners
	Signature Family Wealth
	Tiedemann Wealth Management
Best new product for HNW advisory	Accretive Capital Partners
	Envestnet
	Heritage Financial Planning
	Private Wealth Systems
	Providence Family Offices
	WealthSite
	Webster Private Bank
Best investment platform - client service	Brown Brothers Harriman
	CAIS
	Citi Private Bank
	Dynasty Financial Partners
	InvestCloud
	InvestEdge
	SS&C Advent Software - Black Diamond
Best trustee service	Atlantic Trust Private Wealth
	Brown Brothers Harriman
	Fiduciary Trust Company
	Hawthorn, PNC Family Wealth

	Wealth Advisors Trust Company
Best multi-family office - client service - under \$2bn	ClearPath Capital Partners
	Delegate Advisors
	Johnson Financial Group
	Keystone Global Partners
	LLBH Private Wealth Management
	Market Street Trust Company
	Round Table Wealth Management
Best multi-family office - client service - over \$2bn	Boston Private Wealth
	Fieldpoint Private GenSpring
	Family Offices Hawthorn, PNC
	Family Wealth Inverness
	Counsel
	InvestCloud
	Signature Family Wealth
Best multi-family office - overall - under \$2bn	LLBH Private Wealth Management
	Market Street Trust Company
	Northland Wealth Management
	Round Table Wealth Management
	Socius Family Office
	Waldron Private Wealth
Best multi-family office - overall -	Ascent Private Capital

over \$2bn	Management of U.S. Bank
	Atlantic Trust Private Wealth
	CTC myCFO
	Forbes Family Trust
	JDJ Family Office Services
	Pitcairn
	WE Family Offices
Best outsourced CIO solution	Atrato Advisors
	CTC myCFO
	Delegate Advisors
	Dynasty Financial Partners
	Envestnet
	Socius Family Office
	Tiedemann Wealth Management
Best family office service provider	Archway Technology Partners
	EisnerAmper
	External IT
	JDJ Family Office Services
	O'Connor Davies
	Silver Lane Advisors
	Summitas
Best consulting firm for family offices	Baker Aurora
	EisnerAmper
	Family Office Metrics
	Mack International

	Oakbrook Solutions
	Silver Lane Advisors
	Winston Art Group
Best lifestyle firm	Black Bag
	Heritage Financial Planning
	Lifestylist Advisory
	Teresa Leigh Household Risk Management
Best philanthropic/educational initiative	American Endowment Foundation Fidelity
	Charitable
	Foundation Source
	Heritage Financial Planning
	Inverness Counsel
	Jewish Communal Fund
Best technology platform	Charles River Development
	Envestnet
	Pershing Advisor Solutions, a BNY Mellon company
	Private Client Resources
	Providence Family Offices
	Summitas
	SunGard
Best high-net-worth insurance company	Baldwin Krystyn Sherman Partners
	Chubb Insurance
	PURE Insurance
Best private wealth manager - client	Accretive Capital Partners

service - under \$5bn

	Clear Harbor Asset Management
	Heritage Financial Planning
	Massey Quick & Co.
	Northland Wealth Management
	Waldron Private Wealth
	Wellesley Investment Advisors
Best investment platform - innovation	Artivest
	Dynasty Financial Partners
	Envestnet
	InvestCloud
	InvestEdge
	MyVest
	SS&C Advent Software - APX and Advent Direct
Best investment platform - performance	Atlantic Trust Private Wealth
	Brown Brothers Harriman
	CTC myCFO
	Evercore Wealth Management
	InvestEdge
	Longboard Asset Management
	SS&C Advent Software - APX and Advent Direct
Best reporting solution	Addepar
	Archway Technology Partners

	Envestnet
	InvestEdge
	O'Connor Davies
	Private Client Resources
	Private Wealth Systems
Best high-net-worth insurance broker	Crystal & Company
	Frenkel & Company
	HUB International Personal Insurance
	Marsh Private Client Services
	Personal Risk Management Solutions
Best RIA for HNW clients	Algonquin Advisors
	Clear Harbor Asset Management
	Forbes Family Trust
	GenSpring Family Offices
	Inverness Counsel
	LLBH Private Wealth Management
	Tiedemann Wealth Management
Best fund product for HNW clients	Artinvest
	Atlantic Trust Private Wealth
	Accretive Capital Partners
	Algonquin Advisors
Best private client law firm	Cantor & Webb P.A.
	Handler Thayer

	Withers Bergman
Best HNW security solution	Summitas
	MyVest
	Private Wealth Systems
	SunGard
Best private client audit firm	Anchin, Block & Anchin
	Eisner Amper
	O'Connor Davies
Best private client tax solution	Anchin, Block & Anchin
	Eisner Amper
	Handler Thayer
	O'Connor Davies
Best trusts and estates division	Anchin, Block & Anchin
	Fiduciary Trust Company
	Handler Thayer
	Tiedemann Wealth Management
Best newcomer	Artivest
	Heritage Financial Planning
	Private Wealth Systems
	FallLine Securities
	Family Wealth Advisors (Bank of the West)
Private banking - innovation	Bank of the West Wealth Management
	Boston Private
	InvestCloud
	Pershing Advisor Solutions, a

	BNY Mellon company
	Private Client Resources
	Private Wealth Systems
Private banking - overall	Ascent Private Capital Management of U.S. Bank
	Bank of the West Wealth Management
	Boston Private
	Brown Brothers Harriman
	Citi Private Bank
	First Republic Bank
	Pershing Advisor Solutions, a BNY Mellon company
Private banking - client service	Ascent Private Capital Management of U.S. Bank
	Bank of the West Wealth Management
	Boston Private
	Brown Brothers Harriman
	Citi Private Bank
	First Republic Bank
	Key Private Bank
Best private wealth manager - under \$5bn	Accretive Capital Partners
	ClearPath Capital Partners
	Fieldpoint Private
	Forbes Family Trust
	HSW Advisors, Hightower

Massey Quick & Co.

Round Table Wealth
Management

Best law firm - client service

Handler Thayer

Lowenstein Sandler

Withers Bergman

Organised by



EVENT TIMES

**Monday February
22, 2016**

6:30 until 11.30pm
Venue: 583 Park
Avenue, New York

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