



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	
Best fund product for HNW clients - NEW	<ul style="list-style-type: none"> Accretive Capital Partners AM Global Family Investment Office Canid Asset Management Kayne Anderson Rudnick New York Private Bank & Trust Spruce Investment Advisors
Best liquid alternatives solution	<ul style="list-style-type: none"> Canid Asset Management Citi Invesco Neuberger Berman
Best multi-family office - client service - over \$2.5bn	<ul style="list-style-type: none"> Ascent Private Capital Management of U.S. Bank Aspiriant Atlantic Trust CTC myCFO Fieldpoint Private Forbes Family Trust Hawthorn,PNC Family Wealth
Best multi-family office - client service - under \$2.5bn	<ul style="list-style-type: none"> BP Wealth Management Camden Capital Delegate Advisors Keystone Global Partners LLBH Private Wealth Management Market Street Trust Company Northland Wealth Management
Best multi-family office - overall - new product	<ul style="list-style-type: none"> Atlantic Trust Forbes Family Trust Hawthorn,PNC Family Wealth LLBH Private Wealth Management New York Private Bank & Trust Spruce Investment Advisors
Best multi-family office - overall - over \$2.5bn	<ul style="list-style-type: none"> Ascent Private Capital Management of U.S. Bank Atlantic Trust

	<p>Ballentine Partners CTC myCFO Fiduciary Trust Company International Fieldpoint Private Forbes Family Trust Hawthorn,PNC Family Wealth</p>
Best multi-family office - overall - under \$2.5bn	<p>BP Wealth Management Inverness Counsel Keystone Global Partners LLBH Private Wealth Management Market Street Trust Company New York Private Bank & Trust Waldron Private Wealth</p>
Best multi-family office service provider	<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>
Best newcomer - private wealth manager	<p>Delegate Advisors Keystone Global Partners Northland Wealth Management Waldron Private Wealth</p>
Best private wealth manager - client service - over \$5bn	<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>
Best private wealth manager - client service - under \$5bn	<p>Beekman Wealth Advisory Forbes Family Trust HSW Advisors, HighTower Keystone Global Partners LLBH Private Wealth Management SEI WE Family Offices</p>
Best private wealth manager - new product	<p>Algonquin Advisors Atlantic Trust Forbes Family Trust Kayne Anderson Rudnick LLBH Private Wealth Management Spruce Investment Advisors United Capital Financial Advisers</p>
Best private wealth manager - over \$5bn	<p>Ascent Private Capital Management of U.S. Bank Atlantic Trust Brown Advisory Brown Brothers Harriman Capital Group Private Client Services</p>

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

Private banking - innovation	Bank of the West New York Private Bank & Trust Pershing Advisor Solutions , a BNY Mellon company Private Client Resources Wise Counsel Research
Private banking - new product	Bank of the West Boston Private Bank & Trust Company First Republic Bank New York Private Bank & Trust
Private banking - North America	Bank of the West Boston Private Bank & Trust Company Brown Brothers Harriman Citi Private Bank First Republic Bank
Private banking - overall	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
Private client investment platform - client service	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
Private client investment platform - innovation	CTC myCFO Dynasty Financial Partners InvestEdge Keystone Global Partners New York Private Bank & Trust Tiedemann Wealth Management WealthSite Inc. Where Americans are Welcome
Private client investment platform - new product	Spruce Investment Advisors Wealth Advisors Trust Company WealthSite Inc.
Private client investment platform - performance	Brown Brothers Harriman CTC myCFO Spruce Investment Advisors

Advisory Categories

Best family office consulting firm	Atrato Advisors Baker Aurora Cassford Mangement Family Office Metrics Insite Security Inc. Mack International Winston Art Group

Best high-net-worth insurance broker	Baldwin Krystyn Sherman Partners Crystal & Company Frenkel & Company HUB International Personal Insurance Marsh Private Client Services NEBCO Insurance Services Personal Risk Management Solutions
Best high-net-worth insurance company	ACE Private Risk Services AIG (Private Clients) Chubb Group of Insurance Companies Privilege Underwriters Reciprocal Exchange (PURE)
Best lifestyle firm	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
Best philanthropic/educational initiative	Foundation Source Hawthorn,PNC Family Wealth Inverness Counsel LLBH Private Wealth Management Wise Counsel Research -- Outstanding Contribution -- Thought Leadership
Best reporting solution	Advent Software Archway Technologies Envestnet Tamarac Envestnet, Inc. InvestCloud InvestEdge Private Client Resources WealthSite Inc.
Best technology platform	Axial Archway Technologies CAIS Charles River Development Private Client Resources Summitas SunGard United Capital Financial Advisers
Best wealth solution	CAIS Hawthorn,PNC Family Wealth InvestCloud Kayne Anderson Rudnick Personal Risk Management Solutions SS&C Technologies, Inc. Winston Art Group

Legal Categories

Best law firm - private client	Cantor & Webb P.A. Handler Thayer Lowenstein Sandler
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	Withers Bergman
Best law firm - client service	Cantor & Webb P.A. Handler Thayer Lowenstein Sandler Withers Bergman
Best overall law firm	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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