



Awards Categories & Criteria

United States

GENERAL WEALTHTECH CATEGORIES (US)

DATA, INFORMATION OR BUSINESS INTELLIGENCE PROVIDER

Awarded to: An information, data or business intelligence provider in the US wealth management space.

OUTSOURCING AND BUSINESS PROCESS MANAGEMENT

Awarded to: An outsourcing or business process management company working in the US wealth management sector.

CLIENT MARKETING AND PROSPECTING

Awarded to: A provider of client marketing and/or prospecting services to the US wealth management industry.

DATA MANAGEMENT AND ANALYSIS

Awarded to: An organization providing data management and/or analysis services to the US wealth management industry.

DOCUMENT MANAGEMENT AND STORAGE

Awarded to: A company providing document management and /or storage technology to the US wealth management industry.

FINANCIAL PLANNING

Awarded to: A technology tool provided to the US wealth management sector to enhance and automate financial planning.

INVESTMENT PLATFORM OR TOOLS

Awarded to: A technology-based investment platform or tools for the US wealth management industry.

BUSINESS INFRASTRUCTURE

Awarded to: A business providing technology infrastructure support for the US wealth management industry.

TRADING SYSTEMS

Awarded to: A trading system used by the US wealth management industry.

SOFTWARE MANAGEMENT COMPANY

Awarded to: A business offering advice and guidance on software management issues to the US wealth management industry.

GENERAL WEALTHTECH CATEGORIES (US)

OVERALL US WEALTHTECH PROVIDER

Awarded to: A technology business specialising in wealth management in the US market, offering a comprehensive WealthTech solution.

FUND ADMINISTRATION

Awarded to: A technological solution tailored specifically for the US fund administration market.

FAMILY OFFICE SOLUTION

Awarded to: A wealth technology company whose offering is specifically addressing the needs of family offices in the US.

ONBOARDING PRODUCT

Awarded to: A wealth-management focussed provider operating in the US market that offers onboarding solutions.

CLIENT LIFECYCLE MANAGEMENT

Awarded to: A technology provider operating in the US market that offers solutions in any aspect of the client journey.

CRM PROVIDER

Awarded to: A technology business providing client relationship solutions to US wealth management businesses.

TRANSACTION PROCESSING

Awarded to: A transaction processing solution provider operating in the US wealth management market.

PORTFOLIO MANAGEMENT

Awarded to: A technology provider offering portfolio management solutions to the US and wealth management market.

INVESTMENT PLATFORM

Awarded to: An organisation offering investment management technology in the US.

INNOVATIVE SOLUTION

Awarded to: A technology company whose offering to the US wealth management market is viewed as challenging the status quo.

STRUCTURED PRODUCTS SOLUTION

Awarded to: A company whose structured products or service provision to the US wealth management market is viewed as both innovative and best in class.

SUITABILITY

Awarded to: A provider of client suitability solutions in the US wealth management market.

FRONT OFFICE

Awarded to: A provider of any front office solution to the US wealth management market.

BLOCKCHAIN & CRYPTOCURRENCIES SOLUTION

Awarded to: A solution provider to the US wealth management market that uses blockchain technology and/or cryptocurrencies as part of its offering.

DATA PROVIDER

Awarded to: A provider of data services to the US wealth management market.

PAYMENT RECONCILIATION SERVICES

Awarded to: A provider of payment reconciliation services to the US wealth management market.

RISK MONITORING AND MANAGEMENT

Awarded to: A provider of risk monitoring and/or management services to the US wealth management market.

CLIENT/CONSOLIDATED REPORTING

Awarded to: A client reporting solution provider to the US wealth management market.

DATA PROTECTION SOLUTION

Awarded to: A data protection solution provider to the US wealth management market.

CORE BANKING SOFTWARE

Awarded to: A provider of core banking technology for the US wealth management market.



Awards Categories & Criteria

United States

CYBER & NETWORK SECURITY

Awarded to: A solution that helps counter the threat posed by cyber crime and network security breaches to the wealth management community in the US.

ROBO PRODUCT OR PLATFORM

Awarded to: A platform, product or solution that reduces human interaction in the wealth management process in the US.

RIA PLATFORM

Awarded to: A bank or custodian providing a platform on which RIAs can service their clients.

ARTIFICIAL INTELLIGENCE (AI) APPLICATION

Awarded to: A technology company that uses Artificial Intelligence as all or part of its offering to the US wealth management market.

NEWCOMER/START-UP

Awarded to: A technology business that is in early stage development and has an offering for the US wealth management market.

CLIENT COMMUNICATION SOLUTION OR TOOL

Awarded to: A solution provider that enables or enhances communications between wealth managers and their clients in the US.

DIGITAL OFFERING OR TOOL

Awarded to: A business that enables US wealth managers to leverage digital channels and/or media to better interact with their clients.

CLIENT ACCOUNTING

Awarded to: A solution that provides client accounting solutions for the US wealth management market.

EAM PLATFORM/CUSTODIAN

Awarded to: A bank or custodian providing a platform on which external asset managers (FIMs) in the US can service their clients.

BILL PAY

Awarded to: Technology-based bill payment solutions in the US wealth management sector.

DATA AGGREGATION

Awarded to: Technology solution providers specializing in tools for wealth managers and financial institutions to facilitate financial data aggregation.

REGTECH & COMPLIANCE CATEGORIES (US)

INNOVATIVE COMPLIANCE/REGTECH PRODUCT

Awarded to: A compliance or regulation technology solution for the US wealth management market that can demonstrate a new approach or significant innovation.

KYC PRODUCT

Awarded to: A technology provider that delivers a know your customer solution for the US wealth management community.

REGULATORY REPORTING

Awarded to: A technology provider that delivers a regulatory reporting solution for the US wealth management community.

DATA GOVERNANCE

Awarded to: A technology provider that delivers a data governance solution for the US wealth management community.

WEALTHTECH CONSULTANCY & TRAINING CATEGORIES (US)

CONSULTANCY

Awarded to: A consultancy active in the US wealth management market.

OUTSOURCING/PARTNERSHIP

Awarded to: A consultancy for its work in outsourcing and/or partnerships with US wealth management businesses.

THOUGHT LEADERSHIP

Awarded to: A consultancy for its thought leadership for the US wealth management industry.

TRAINING SOLUTION

Awarded to: A consultancy for its work in training for the US wealth management industry.

IMPLEMENTATION/PARTNER

Awarded to: A consultancy for its work in implementing a technology solution for an US wealth management business.

INDIVIDUAL & LEADERSHIP WEALTHTECH CATEGORIES (US)

GROWTH/BUSINESS DEVELOPMENT STRATEGY/ACQUISITION

Awarded to: A wealth technology business for its strategy in the US.

THOUGHT LEADERSHIP (NON CONSULTANCY)

Awarded to: A wealth technology business for its thought leadership in the US.

WEALTHTECH EMPLOYER

Awarded to: A wealth technology provider active in the US market.

CHIEF TECHNOLOGY OFFICER (CTO)

Awarded to: An individual working with an organisation active in the US market.

REGIONAL MANAGEMENT TEAM/CEO

Awarded to: A local management team from a technology company active in the US.

INNOVATOR OF THE YEAR

Awarded to: An individual, business or team that can demonstrate genuine innovation in wealth management technology in the US.

DIVERSITY

Awarded to: A wealth technology business for its commitment to diversity in the US.



Awards Categories & Criteria

United States, Canada & Latin America

LEADING INDIVIDUAL

Awarded to: An outstanding individual for their work in the wealth technology sector in the US.

WOMEN IN WEALTHTECH

Awarded to: An outstanding woman for their work in the wealth technology sector in the US.

MARKETING TEAM/PR

Awarded to: A marketing or PR team for their work in the wealth technology sector in US.

LIFETIME ACHIEVEMENT

Awarded to: An individual to recognise their outstanding achievement over a substantial career in wealth management technology in the US.

RECRUITER

Awarded to: A wealth technology business active in the US for its ability to recruit and retain talent in the market.

GENERAL WEALTHTECH CATEGORIES (CANADA)

FAMILY OFFICE SOLUTION

Awarded to: A wealth technology company whose offering is specifically addressing the needs of family offices.

FUND ADMINISTRATION

Awarded to: A technological solution tailored specifically for the Canadian fund administration market

OVERALL WEALTHTECH PROVIDER

Awarded to: A technology business specialising in wealth management in the Canadian market, offering a comprehensive WealthTech solution.

INNOVATIVE CLIENT SOLUTION

Awarded to: A technology company whose offering to the Canadian wealth management market is viewed as challenging the status quo.

REGTECH CATEGORY - CANADA

INNOVATIVE COMPLIANCE/REGTECH PRODUCT

Awarded to: A compliance or regulation technology solution for the Canadian wealth management market that can demonstrate a new approach or significant innovation.

CONSULTANCY CATEGORY (CANADA)

CONSULTANCY SERVICES

Awarded to: A consultancy active in the Canadian wealth management market.

INDIVIDUAL & LEADERSHIP CATEGORY (CANADA)

LEADING INDIVIDUAL

Awarded to: An outstanding individual for their work in the wealth technology sector in Canada.

GENERAL WEALTHTECH CATEGORIES (LATIN AMERICA)

FAMILY OFFICE SOLUTION

Awarded to: A wealth technology company whose offering is specifically addressing the needs of family offices.

FUND ADMINISTRATION

Awarded to: A technological solution tailored specifically for the LatAm fund administration market.

OVERALL WEALTHTECH PROVIDER

Awarded to: A technology business specialising in wealth management in the LatAm market, offering a comprehensive WealthTech solution.

INNOVATIVE CLIENT SOLUTION

Awarded to: A technology company whose offering to the Latam wealth management market is viewed as challenging the status quo.

REGTECH CATEGORY - LATIN AMERICA

INNOVATIVE COMPLIANCE/REGTECH PRODUCT

Awarded to: A compliance of regulation technology solution for the Latam wealth management market that can demonstrate a new approach or significant innovation.

CONSULTANCY CATEGORY (LATIN AMERICA)

CONSULTANCY SERVICES

Awarded to: A consultancy active in the Latam wealth management market.

INDIVIDUAL & LEADERSHIP CATEGORY (LATIN AMERICA)

LEADING INDIVIDUAL

Awarded to: An outstanding individual for their work in the wealth technology sector in Latin America.

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