



INDUSTRY AWARDS

2017 MMI/Barron's Industry Awards – FINALISTS BY CATEGORY

Technology

BlackRock – iRetire
Investnet – Data Aggregation and Analytics
Fiserv – AdvisorVision and Proposal Generation Manager
iCapital Network – Alternative Investments Platform
Vestmark – Vestmark One Expanded Capabilities

Product Innovation – Asset Managers

NextShares Solutions – NextShares
Northern Trust Asset Management – Goal Engineer Series
Swell – Swell Portfolios
T. Rowe Price – ActivePlus Portfolios

Product Innovation – Sponsor Firms

Bank of America Merrill Lynch – Product Expansion on Merrill Lynch One
Cetera Financial Group – My Advice Architect
Primerica – Primerica Advisors Lifetime Investment Platform

Investor Education

BNY Mellon Dreyfus – Brave Conversations on Personal Retirement
Morgan Stanley – Family Wealth Education Program
Natixis Global Asset Management – ESG Target Date Social Media Campaign
New York Life/Mainstay Investments – Wealth Matters Program

Advisor Development

Bank of America Merrill Lynch – Focus Advisor Initiative
Investnet – Essential Advisor Certification Program
Morgan Stanley – Elevate Practice Management e-University
Morningstar – Behavioral Insights Value-Add for Advisors

Doing Good

BlackRock – Partnership with Kiva
Investnet – Investnet Institute on Campus
Legg Mason – Community Outreach
Morgan Stanley/Graystone Consulting – Graystone Foundation
UBS – Community Affairs & Corporate Responsibility and Optimus Foundation

Diversity

Brinker Capital – Corporate Culture
J.P. Morgan – Diversity & Inclusion Program
Morgan Stanley Wealth Management – Women's/Multicultural Leadership Summits
MyVest – People & Culture
State Street Global Advisors – Closing the Gender Gap in Advice