



INDUSTRY AWARDS

2018 MMI/Barron's Industry Awards – FINALISTS BY CATEGORY

Tools & Technology: *honoring advances in financial advisor- or investor-facing technology*

BlackRock – 360° Evaluator

Investnet – Wealth Management Technology Platform

LifeYield – Taxficient Score™

MoneyGuidePro® – G4 Financial Planning Software

“Doing Good”: *honoring programs that support a deserving cause or give back to the communities we serve*

Eaton Vance – Making a Difference Committee

Investnet – Investnet Institute on Campus

Foresters Financial – The Foresters Difference

PIMCO – Purpose at PIMCO – Hunger

Diversity: *honoring efforts to promote and increase workplace diversity in the investment advisory solutions industry*

Advisor Group – Women Forward

CFP Board Center for Financial Planning – Advancing Diversity Initiatives

PIMCO – Global Inclusion, Diversity & Culture Initiative

Sustainable Investing: *honoring programs that support awareness and adoption of sustainable and ESG investing*

Bank of America Merrill Lynch – GWIM Impact Investing Initiative

Calvert – Calvert Ultra-Short Duration Income NextShares

Morgan Stanley – Investing with Impact Platform

Morningstar – Sustainability Ratings, Research, and Tools Services, including the Morningstar Carbon Risk Score

Field Sales Distribution: *honoring firms that exemplify excellence and innovation in wholesaling practices*

American Funds – Wide-ranging Distribution Capabilities

BNY Mellon’s Lockwood Advisors – Business Development & Advisory Consulting Teams

MFS – Client Acquisition and Growth Strategies

Russell Investments – Innovative Wholesaler Practices

Home-Office Sales Support: *honoring firms that provide exemplary and innovative advisor sales support from the home office-level*

Advisor Group – Future is Now

Bank of America Merrill Lynch – ISG Portfolio Strategist Team

Russell Investments – Practice Management Program

Sponsor Platform of the Year: *honoring a sponsor platform that exemplifies innovation and achievement in delivering better outcomes for investors and financial advisors*

Envestnet – Envestnet | PMC Impact Investing Quantitative Portfolios

Morgan Stanley – WealthDesk

Primerica – Lifetime Investment Platform

Asset Manager of the Year (AUM of \$25 billion or less): *honoring a smaller asset manager that exemplifies innovation and achievement in delivering better outcomes for investors and financial advisors*

Clark Capital Management Group – Navigator® Investment Strategies

Horizon Investments – Goals-Based Investing

Tortoise – Making an Impact with Essential Asset Solutions

Asset Manager of the Year (AUM of more than \$25 billion): *honoring a larger asset manager that exemplifies innovation and achievement in delivering better outcomes for investors and financial advisors*

AllianceBernstein – AB FlexFee™ Funds

Legg Mason – MDA Program

Natixis – Natixis Active Index Advisors®

Solutions Provider of the Year: *honoring a solutions provider (technology or service provider) that exemplifies innovation and achievement in delivering better outcomes for investors and financial advisors*

ACA Technology Solutions – NorthPoint Platform

Envestnet – Holistic Wealth Management Technology

Fiserv – Unified Wealth Platform

iCapital Network – Alternative Investments Technology Solution