



INDUSTRY AWARDS

2020 NOMINATION FORM

WEALTH MANAGER PLATFORM OF THE YEAR

(This category is open to wealth management firms)

This category honors wealth management firms whose investment advisory platform exemplifies innovation in delivering better outcomes for investors and financial advisors. Nominations should reflect platform features and capabilities launched (or significantly enhanced) since October 2019.

The Committee will look for needle-moving platform enhancements that contribute to innovation within the investment advisory solutions industry and improve the investor and financial advisor experience.

Are you nominating your own firm? YES NO

Are you a PR/marketing firm nominating a client firm? YES NO

YOUR INFORMATION

Name: _____ Title: _____

Firm name: _____

Email: _____ Phone: _____

If you are nominating your own firm or if you are a PR/marketing firm nominating a client firm, you must also submit a completed nomination form for another firm in another category. If you do not submit a nomination form for another firm, this nomination will not be considered.

Other firm nominated: _____ Category: _____

NOMINEE INFORMATION

Firm nominated: _____

Name of advisory platform nominated: _____

Briefly describe the features and enhancements of the advisory platform for which the wealth management firm is being nominated (150 words or less):

Detail the specific achievements, innovations, and results that qualify the nominee for this award (250 words or less):

Describe why the nominee is deserving of this award as compared to industry peers (250 words or less):

Submit your nomination(s) by emailing the fully completed nomination form(s) to awards@mminst.org. Incomplete forms will not be accepted. **Nominations are due by 5:00pm ET on Tuesday, September 8.**



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