

# RIA Intel Award

June 29, 2022

A previous version of this story stated that the winners would be announced at a dinner and ceremony at the Metropolitan Club of New York on September 14, 2022.

However, due to an unanticipated scheduling conflict with the venue, we regret that Institutional Investor's inaugural RIA Intel Awards Dinner & Gala on September 14 in New York will not take place. We apologize for the inconvenience.

The Awards themselves remain unchanged. Winners will still be announced on RIAIntel.com on September 14, 2022, and will be honored in-person at upcoming RIA Institute Forums.

Each winner will also be the subject of a feature story on RIAIntel.com.

RIA Intel is pleased to announce the finalists for the inaugural RIA Intel Awards. The group is representative of a growing and innovative industry that is overflowing with talent and great minds.

The volume and quality of the nominations submitted far exceeded anything we anticipated — a testament to the industry's interest in recognizing truly distinguished difference-makers.

Among the finalists are well-known — and lesser-known but equally deserving — advisors and executives. There are RIAs big and small, like Creative Planning and Schmidt Financial Group, and some on the leading edge in the industry, like Revere and FP Alpha.

RIA Intel is also proud to honor its first cohort of rising stars in the industry, which includes Kristopher Martin, vice president and wealth advisor at Element Pointe Advisors, and Vanessa Wieliczko, partner and CIO at HoyleCohen and a director at the CFA Society San Diego.

Choosing an Industry Advocate of the Year will be an unenviable challenge. Noel Maye, CEO at Financial Planning Standards Board; Dasarte Yarnway and Emlen Miles-Mattingly, the co-founders of Onyx Advisor Network; and all the other finalists are champions of the industry who deserve thanks.

A full list of the finalists is below.

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## **Advisor of the Year**

- Julie Parisio Roy, director of financial planning and wealth manager, Badgley+Phelps

#### Wealth Managers

- Jacky Petit-Homme, founding partner and wealth advisor, Liberty One Wealth
- Teresa J.W. Bailey, director of development and senior wealth strategist, Waddell & Associates
- Alexandra J. Miele, managing director and partner, The Andriole Group
- Lauren Oschman, partner and CEO, Vestia Personal Wealth Advisors
- Jon Chambers, managing director, SageView Advisory Group
- Matt Reiner, CEO and co-founder Benjamin and portfolio manager, Wela Strategies

#### **RIA of the Year Less Than \$1 Billion AUM**

- Kandor Global
- Schmidt Financial Group
- Manhattan West
- Vestia Personal Wealth Advisors
- Satovsky Asset Management
- Ullmann Wealth Partners
- Falcon Wealth Planning

#### **RIA of the Year More Than \$1 Billion AUM**

- Wipfli Financial Advisors
- Savant Wealth Management
- Edelman Financial Engines
- Keebeck Wealth Management
- Beacon Pointe Advisors
- Merit Financial
- Steward Partners Global Advisory
- Verdenca Capital Advisors
- SEIA
- MAI Capital Management
- Creative Planning

#### **Retirement Plan Advisor of the Year**

- Innovest
- Captrust
- NFP
- OneDigital
- Ayco Personal Financial Management
- Pension Consultants Inc.
- ProCourse Fiduciary Advisors
- Strategic Retirement Partners

## **RIA Growth Leader of the Year**

- Cerity Partners
- CI Financial
- Hightower
- Wealth Enhancement Group
- Beacon Pointe Advisors
- The Colony Group
- Focus Financial Partners
- Captrust
- Rosemont Investment Group

## **Most Innovative Technology of the Year**

- Revere
- RightSize Solutions
- Seeds Investor
- Pontera
- Altruist
- FP Alpha
- Venn by Two Sigma
- +SUBSCRIBE
- Addepar

## **Most Innovative Firm of the Year**

- Facet Wealth
- The Mather Group
- Mission Wealth
- Savvy
- Cresset Asset Management

## **New RIA of the Year**

- Callan Family Office
- Alexander Legacy Private Wealth
- Measure Twice Financial
- Out of the Office Planning

## **CEO of the Year**

- Ron Carson, founder and CEO, Carson Group
- Brent Brodeski, founder and CEO, Savant Wealth Management
- Fielding Miller, co-founder and CEO, Captrust

- Shannon Eusey, CEO, Beacon Pointe Advisors
- Jeff Pierce, principal and CEO, Wipfli Financial Advisors
- Rick Kent, founder and CEO, Merit Financial Advisors
- Lori Van Dusen, founder and CEO, LVW Advisors
- Peter Raimondi, founder and CEO, Dakota Wealth Management

### **CIO of the Year**

- Stephanie Link, portfolio manager and chief investment strategist, Hightower
- Ben Pace, partner and CIO, Certy Partners
- Phil Huber, CIO, Savant Wealth Management
- Donald Calcagni, CIO, Mercer Advisors
- Jack Ablin, CIO, Cresset
- Stephanie Lang, principal and CIO, Homrich Berg
- Shannon Saccocia, CIO, SVB Private

### **Rising Stars of the Year**

- Kristopher Martin, vice president and wealth advisor, Element Pointe Advisors
- Josh Crawford, vice president of coaching, Matson Money
- Marina Shtyrkov, associate director of wealth management, Cerulli Associates
- Liv Gagnon, co-founder, Choir
- Dan Wanous, business development officer, Thrivent Advisor Network
- Arvette Reid, client services director, SEIA
- Arynthon Hardy, wealth advisor and CEO, Hardy Capital Investments
- Vanessa Wieliczko, partner and CIO, HoyleCohen
- Sara Wendt, investment advisor, Miracle Mile Advisors
- Adam Phillips, partner and managing director of portfolio strategy, EP Wealth Advisors

### **Industry Advocate of the Year**

- Noel Maye, CEO, Financial Planning Standards Board
- Andres Garcia-Amaya, founder and CEO, Zoe Financial
- Carina Diamond, chief experience officer, Dakota Wealth Management
- Dasarte Yarnway and Emlen Miles-Mattingly, co-founders, Onyx Advisor Network
- Michael Kitces, founder, Nerd's Eye View
- Barry Mulholland, director of the financial planning program, University of Akron
- Michelle Wong, founder, Nifty Advisor Support
- Allan Boomer, managing partner and CIO, Momentum Advisors
- Brittain Prigge, president and head of relationship management, Balentine

### **Client Advocate of the Year**

- Ka’Neda N. Bullock, founder and president, Master Plan Investment Group
- Lindsey Swanson, founder, Stripper Financial Planning
- Jessica Goedtel, owner and financial planner, Pavilion Financial Planning
- Brian Portnoy, Joy Lere and Neil Bage, co-founders, Shaping Wealth
- Tom Sporkin, managing director of enforcement, CFP Board
- René Nourse, founder, Urban Wealth Management

### **Asset Manager of the Year**

- Dimensional Fund Advisors
- Fidelity Investments
- BNY Mellon
- Ethic
- Charles Schwab
- Capital Group

### **ESG Advocate of the Year**

- Jay Lipman, co-founder and president, Ethic
- Kiley Miller, director of ESG Investment Solutions, Envestnet
- Gabe Rissman, co-founder and president, YourStake
- Peter Krull, founder, CEO and director of investments, Earth Equity Advisors
- Justina Lai, chief impact officer and shareholder, Wetherby Asset Management
- Erika Karp, executive managing director and chief impact officer, Pathstone
- Michael Thrasher (@Mike\_Thrasher) is the editor of RIA Intel and based in New York City.

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