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WealthManagement.com
2019 Industry Awards

Congratulations to all Finalists!

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ORANJ

SNAPPY KRAKEN

TradePMR

NEXA INSIGHTS

First Ascent Asset Management

Learn more about Impact Communications' brand-building strategies at ImpactCommunications.org

WealthManagement.com 2019 Industry Awards Finalist

Snappy Kraken

Award Category

TECHNOLOGY PROVIDERS: Social Media Leadership

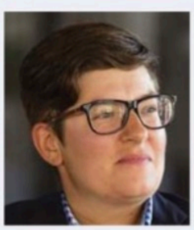
Initiative Name

Visual Insights Digital Campaigns

About the Initiative

Rather than bland email newsletters with boilerplate facts, figures and stock data, our visual insights are fresh, highly visual and encourage sharing across multiple channels. Plus, our system doesn't stop at email; Visual Insights include infographics, landing pages and social media promotions that help advisors get the word out. To increase shareability, each Visual Insight is just one piece of a larger campaign meant to dazzle clients and prospects while informing them—and a graduate of the Prosper Women's accelerator, 2019 Forbes Finance Council.

Social media leadership is about helping our industry use social media in new and innovative ways that are truly out in front of the pack. Our primary goal with this product is to help advisors deliver bold, relevant, helpful communications to build relationships with clients and prospects in a fresh and modern way.



Francesca McLin,
Chief Product Officer

About the Company

Snappy Kraken is the leading provider of marketing automation, online advertising and bold, unique marketing for financial advisors. Each automated campaign on the Snappy Kraken platform is focused on achieving specific and trackable goals that help advisors grow. These goals include lead generation, prospect nurturing, referral generation, and more. Most importantly, Snappy Kraken's clients are granted exclusive rights to their own territory to ensure they never end up using the same marketing as their competition. Services Include: Prospecting & Lead Generation, Nurturing Funnels, Client Newsletters, Referral Generation Campaigns, Automated Workflows, Video Production, and more. All Snappy Kraken members are assigned to a personal Success Specialist who helps them set up, manage and optimize their use of the platform through monthly performance check-ins.

SnappyKraken.com

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WealthManagement.com 2019 Industry Awards Finalist

Oranj

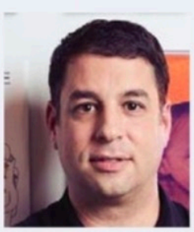
Award Category
TECHNOLOGY PROVIDERS: Model Marketplaces

Initiative Name
Model Marketplace

About the Initiative
Oranj's model marketplace was built to provide advisors with choice and customization. In just 18 months since launch, 17 asset managers have joined the marketplace. A diverse lineup of investment solutions are available in the marketplace, including 800+ mutual funds and ETFs, without additional overlay fees; 75+ pre-constructed strategist models, without additional overlay fees; and 500+ sub-advised strategies.

Advisors can use the model marketplace in three different ways:
- To build custom models and portfolios at the security and class level desired, using a wide array of fund options from our asset partners.
- To select from strategist models that best match client goals and risk tolerance.
- To utilize a sub-advisor and take all of the investment management duties off their plate.

Improvements include enhanced reporting, tracking, solution variety and cost efficiencies. In addition, the marketplace is now designed to seamlessly work with Oranj's rebalancing features. Advisors can assign an account to a model, modify strategies and rebalance into the right allocations. With sub-advised strategies, advisors select the manager/strategy, review the agreement, then assign a client's account to it—which kicks off a fully automated workflow to facilitate signing directly between the investor and the sub-advisor.



David Lyon, CEO

About the Company
Oranj is the industry's first free wealth management platform, giving financial professionals everything they need to run an efficient practice and provide investors with an interactive and engaging experience. Oranj helps advisers offer financial advice for the digital age. A modern experience for clients means investors can view 360° access to their entire financial lives. Powerful back office tools help advisors manage day-to-day portfolio management tasks, and the no-cost platform means advisors can increase profits and lower the cost of investing for investors. For more information about Oranj, please visit our website or follow @runoranjdotcom on Twitter.

www.runoranj.com

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WealthManagement.com 2019 Industry Awards Finalist

NEXA Insights, LLC

Award Category

TECHNOLOGY PROVIDERS: Innovation New Applications

Initiative Name

Client Survey Tool

About the Initiative

NEXA Insights launched in January of 2019 to provide advisors with comprehensive information regarding what their clients are thinking. Financial advisors can better serve their clients with knowledge that clients are hesitant to communicate directly. NEXA Insights' platform provides an objective, third-party method for clients to communicate with their advisors. That information is then analyzed and made actionable to advisors in real time.

Our objective is to give financial advisors the ability to measure and enhance their client experience, immediately address client needs and ensure client objectives are being met.

Jim Starcev, Partner

About the Company

NEXA Insights tells financial advisors what their clients are thinking so advisors can better serve their clients. NEXA Insights gives the client a simple, easy-to-use platform to provide information for their advisor. Our analytics engine then generates meaningful data the advisor can use immediately.

www.nexainsights.com

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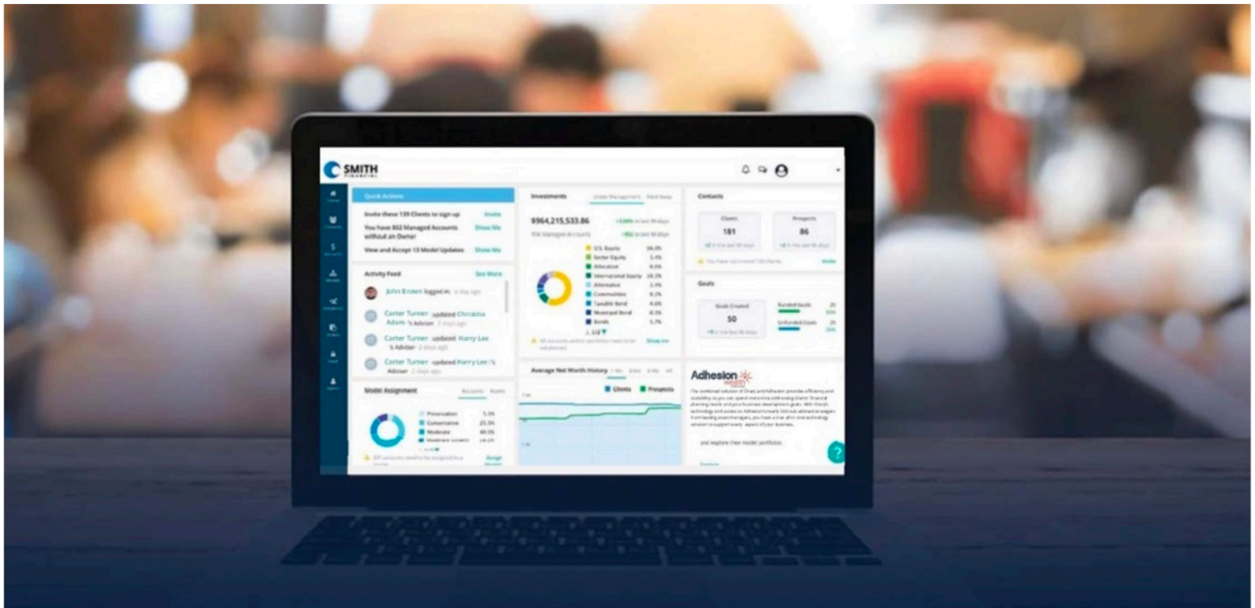

WealthManagement.com 2019 Industry Awards Finalist

First Ascent Asset Management

Award Category
ASSET MANAGERS: ETF Strategists

Initiative Name
Factor Select Portfolios

About the Initiative

First Ascent's "Factor Select" portfolios incorporate the latest research on factor-based investing in tax-sensitive and nontaxable versions while providing exposure to multiple, noncorrelated factors such as value, size, momentum and quality.

They use an open architecture approach that includes iShares, Goldman Sachs and Vanguard and combines exchange traded funds (ETFs) from firms that use different approaches to factor investing to enhance diversification.

The "elegantly simple" approach to portfolio construction reduces client costs and expenses and offers factor-based portfolios for a low, flat fee. Our goal is to create for advisors the best factor portfolios at the lowest cost.

First Ascent Asset Management

Scott MacKillop, CEO

About the Company

First Ascent is an innovator in providing outsourced portfolio management services to financial advisors. It combines modern technology, an industry-first flat-fee pricing structure, a unique approach to portfolio management, and a high-touch service model to make outsourcing easy, affordable and rewarding for advisors.

Working with First Ascent makes every advisor look like a hero in the eyes of their clients. First Ascent creates an excellent client experience through the intelligent use of technology, its low, transparent fees, and its "elegantly simple" approach to portfolio management, which helps clients keep more of what they earn.

Advisors who want an experienced partner who understands their business and cares as much about their clients as they do should consider First Ascent.

www.firstascentam.com

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WealthManagement.com 2019 Industry Awards Finalist

Oranj

Award Category

TECHNOLOGY PROVIDERS: Client Portals

Initiative Name

New Investor Portal

About the Initiative

Oranj released the redesigned investor portal that provides advisors and their clients with personalized onboarding coupled with a modern mobile experience. It allows clients to collaborate with their advisor in a variety of ways.

The new investor portal provides clients and prospects a process that captures their entire financial picture. Onboarding/Account Opening/Transfer automates custodian-specific paperwork and captures electronic signatures for opening/transferring accounts. Investors can set long-term investing goals and assign specific accounts they hold to their goals. Oranj's secure real-time chat enables secure communication between advisor/ clients to eliminate lengthy meetings and gets important questions answered quickly. Files can be shared between investors and advisors using Oranj's secure document vault.

Advisors can gain an investor's wholistic financial picture. They can now consider the value of their client's properties, which Oranj aggregates through an integration with Zillow. Investors can also track insurance policies that include life, disability and long-term care. By having a single place to track their entire financial picture, investors can track cash flow, complete net worth and view a detailed balance sheet in real time.

ORANJ

David Lyon, CEO

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WealthManagement.com 2019 Industry Awards Finalist

Snappy Kraken

Award Category

TECHNOLOGY PROVIDERS: Chief Marketing Officer of the Year

Nominee

Angel Gonzalez

About the Nominee

Angel Gonzalez is the Chief Marketing Officer at Snappy Kraken. As such, he is responsible for all company marketing initiatives, brand advocacy, campaign development, lead generation and more.

The marketing prowess of the Snappy Kraken organization is evident from how quickly this startup has risen from obscurity in 2016 to a recognized and respected leader in the advisor marketing arena in 2019. The bold and unique image of Snappy Kraken is largely attributable to Gonzalez, and his marketing chops are evident in everything Snappy Kraken does.

Snappy Kraken's bold and instantly recognizable branding clearly sets it apart from other marketing companies in the space, and Gonzalez continues to push the limits of what a financial marketing company can achieve.

Angel Gonzalez, Chief Marketing Officer

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SnappyKraken.com

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First Ascent Asset Management

Award Category
TAMPs

Initiative Name
"First Impressions" Advisor Education Program

About the Initiative

"First Impressions" is a multi-media, multi-channel educational program for financial advisors. It is designed to benefit the broader community of financial advisors, regardless of whether they work with our firm. We produce content in diverse formats such as videos, whitepapers, blogs, webinars and articles. Content is created by First Ascent personnel, advisors and industry experts. We distribute our content through multiple channels including the First Ascent website, the First Ascent YouTube channel, social media, the Internet/webinars, industry publications, newsletters and email campaigns.

As members of the financial advisor ecosystem, our goal is to help its members in three ways:
• Provide objective information about important industry developments and trends.
• Help advisors run their businesses more effectively and efficiently.
• Help advisors educate and inform their clients about how to behave as successful investors.

None of the educational material provided to advisors directly promotes First Ascent or its services, and it is available to all members of the advisor community.

First Ascent Asset Management

Scott MacKillop, Chief Executive Officer

About the Company

First Ascent is an innovator in providing outsourced portfolio management services to financial advisors. It combines modern technology, an industry-first flat-fee structure, and a high-touch service model to make outsourcing easy, affordable and rewarding for advisors.

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www.firstascentam.com

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TradePMR

Award Category

CUSTODIANS: Corporate Social Responsibility/Diversity

Initiative Name

20 for 20 Initiative

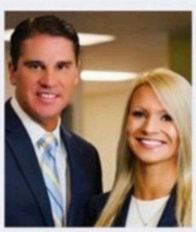
About the Initiative

TradePMR has a history of giving back to the local community. For the past five years, the company has also hosted an Oktoberfest event to raise funds for "Lyrics for Life," a charitable organization that supports children with cancer.

In 2018, TradePMR celebrated its 20th anniversary by organizing and participating in 20 service projects, all led and staffed by employees. "As a company, we take great pride in our white glove service," said TradePMR founder and CEO Robb Baldwin. "The 20-for-20 initiative allowed TradePMR to extend this cultural point of pride to the communities in which we work and live."

Through this unique initiative, TradePMR leadership and staff supported a variety of causes in the areas of health, education, family services, pediatric cancer research, mental health, women's issues, breast cancer research and animal well-being. Among the recipients were the Ronald McDonald House, Boys and Girls Clubs, Alex's Lemonade Stand, Tyler's Hope, NAMI and March for Babies.

TradePMR



Rob Baldwin, CEO and Monika Baldwin, Director of Social Media

About the Company

For more than two decades, TradePMR has worked with growth-minded independent registered investment advisors (RIAs) helping to provide the innovative technology tools and support designed to transform their businesses. The privately held brokerage and custodian services provider (member Financial Industry Regulatory Authority [FINRA] and Securities Investor Protection Corp. [SIPC]), based in Gainesville, Florida, works to streamline fee-only investment advisors' operations through comprehensive custodial, operational and trading support.

www.tradepmr.com

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First Ascent Asset Management

Award Category

ASSET MANAGERS: Thought Leadership Advisor Education

Initiative Name

"First Impressions" Advisor Education Program

About the Initiative

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Scott MacKillop, CEO

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