

IGNITES

Announcing This Year's Winners

Nearly 750 advisors across channels weighed in to tell us which asset managers and retirement plan providers they value most. Meet the winners.

By Alana Pipe | October 3, 2022

We are proud to present the winners of the third annual Financial AdvisorIQ Service Awards.

The results were announced last week at the Financial Times Future of Asset Management conference in New York.

Ignites Research and sister publication Financial Advisor IQ worked together on fielding the surveys and calculating the results. Each day this week, Ignites will highlight one group of honorees — large, midsize and boutique managers or retirement plan providers — drilling down to show what advisors say they like best.

Today, we look at the overall winners.

These awards honor the asset managers, defined contribution plan recordkeepers and other business partners that advisors consider the most valuable in their day-to-day practices.

We collected the votes of 742 advisors through an online poll fielded this spring. Advisors came from across channels and practice sizes. You can learn more about them through our methodology section.

Advisors weighed in on which firms had the best sales and relationship management teams and product lineups, and which ones they value most for market commentary in the form of portfolio manager letters, macroeconomic insights, white papers, audio/video and overall content.

Managers were divided into groups: large (\$100 billion or more in mutual and exchange-traded fund assets; midsize (between \$20 billion and \$100 billion); and boutique (those with less than \$20 billion in assets).

Retirement plan specialists were among those who voted on recordkeepers with the best service, pricing, reporting and cybersecurity provisions, as well as their favorite overall. These advisors also voted on their favorite target-date fund providers and Erisa counsel.

In all, there were 92 awards recognizing outstanding service from 25 different companies.

American Funds was the large manager to win the greatest number of awards, garnering 12.

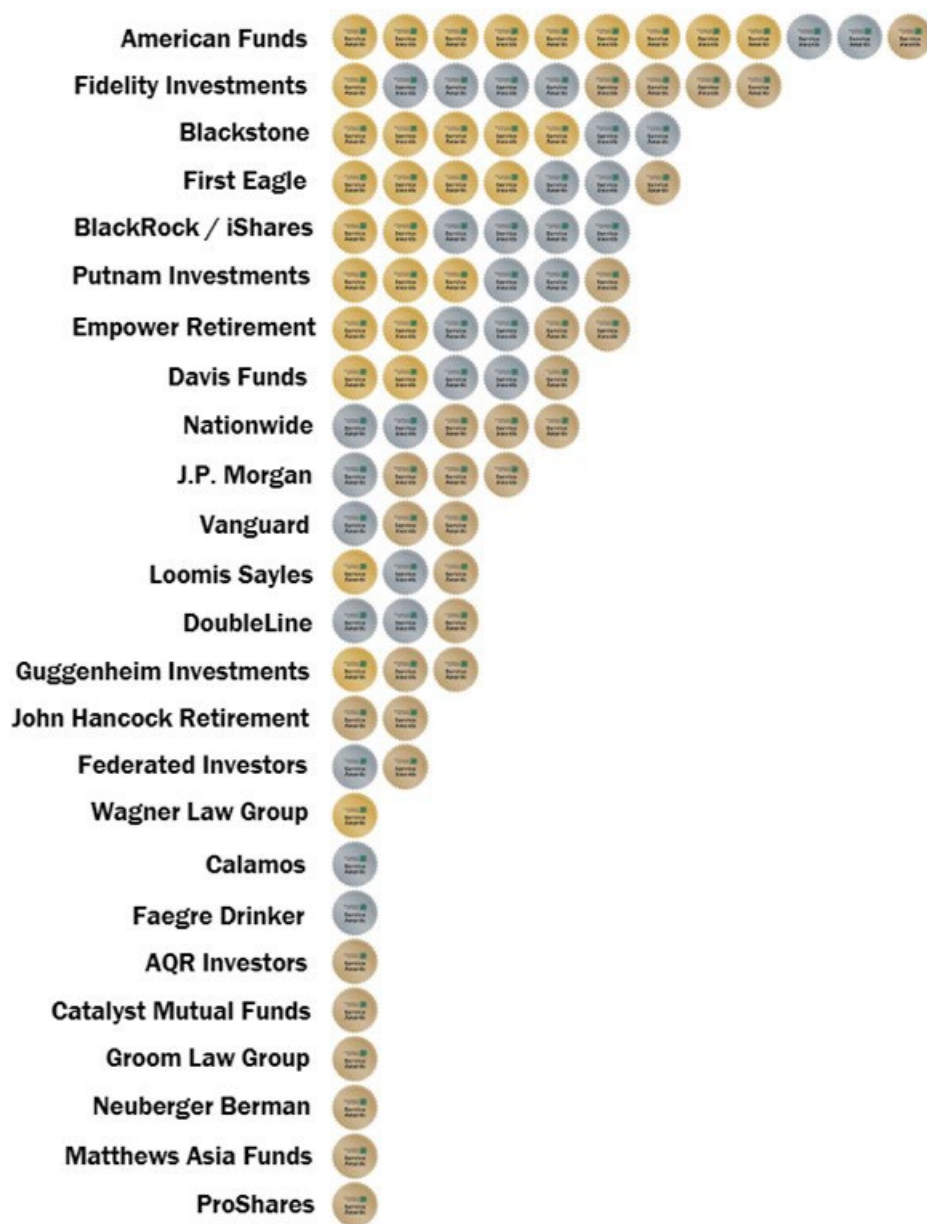
First Eagle was the top trophy-taker among midsize managers, with seven.

Blackstone garnered the most awards among boutique retail asset management firms, taking seven titles.

Among recordkeepers, Empower and Fidelity tied in number of category wins.

2022 Financial Advisor IQ Service Award Winners

Hover for details on each award.



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