2020 Investments & Wealth Institute Awards Recognize Outstanding Achievements

By Devon Coquillard

The Investments & Wealth Institute® presented five prestigious awards recognizing outstanding contributions to the investment and wealth management industry.

INVESTMENT CONSULTING IMPACT AWARD

The Investment Consulting Impact Award honors individuals who have made an outstanding contribution and demonstrated commitment to the field of investment consulting, including contributions to industry-specific technology or to advances in the advisor skill set. The 2020 honoree is **Jeremy J. Siegel**, PhD, the Russell E. Palmer Professor of Finance at The Wharton School of the University of Pennsylvania. He is also the author of *Stocks for the Long Run* and *The Future for Investors: Why the Tried and the True Triumph over the Bold and New*.

WEALTH MANAGEMENT IMPACT AWARD

This award honors individuals who have contributed exceptional advancements in the field of private wealth management, embodied by the Investments & Wealth Institute Certified Private Wealth Advisor® (CPWA®) program. The award recognizes key innovations and thought leadership in any of the following CPWA knowledge domains: human dynamics, wealth management strategies, client specialization, and legacy planning. The 2020 recipient is **Anthony B. (Tony) Davidow,** CIMA®, founder and president of T. Davidow Consulting, LLC, an independent consulting firm serving the needs of sophisticated advisors, asset managers, and family offices. Previously, Davidow was alternative beta and asset allocation strategist for the Schwab Center for Financial Research; he was a subject matter expert on smart beta strategies, alternative investments, and environmental, social, and governance investing among other areas of expertise. He served on the Investments & Wealth Institute board of directors during 2009–2015, and he currently serves as chair of the *Investments & Wealth Monitor* editorial advisory board and moderator of the Exceptional Advisor Webinar Series. He's also a member of the Investments & Wealth Institute WealthBoard 100 Advisory Board.

GOVERNANCE INSIGHT AWARD

The Governance Insight Award honors the author of a written work (e.g., article, paper, book) published in the previous year that has made a significant contribution to advancing the understanding and knowledge of investment and wealth management, including contributions in ethics, legal, and regulatory issues that affect these professional practices. The 2020 recipient is **Duane Thompson**, AIFA®, president of Potomac Strategies, for his article, "Harmonizing Regulation Best Interest with Fiduciary Practices," which was published in the November/December 2019 issue of *Investments & Wealth Monitor*.

JOURNAL RESEARCH AWARD

The Journal Research Award honors the author(s) of an original article that represents the best writing for the previous year, is germane to investment consulting and/or private wealth management, and was published in the *Journal of Investment Consulting* or the *Retirement Management Journal*. The 2020 recipient is **James B. Sandidge**, JD. Sandidge was recognized for his *Retirement Management Journal* article, "Chaos and Retirement Income."

INVESTMENTS & WEALTH MONITOR WRITING AWARD

This award honors Investments & Wealth Institute members for their excellent editorial contributions to *Investments & Wealth Monitor* during the previous year. The 2020 honoree is **Noel Pacarro Brown**, CIMA®, CPWA®, family wealth advisor, investing with impact director, first vice president, The Conscious Wealth Management Group at Morgan Stanley, for her article, "Bloom, Not Bust: The Rise of Impact Investing and the Next Wave of Wealth" (March/April 2019 issue). The Awards Committee also recognized two authors with honorable distinction: **Michael Kitces**, MSFS, MTAX, CFP®, CLU, ChFC, RHU, REBC, CASL, partner and director of research for Pinnacle Advisory Group, publisher of *The Kitces Report* and *Nerd's Eye View*, for "Unbundling of the TAMP and Rise of the Model Marketplace" (July/August 2019 issue); and **Scott Welch**, CIMA®, chief investment officer–model portfolios, WisdomTree Asset Management, for "Coming to Portfolios Near You: Investment Ideas You Should Be Paying More Attention To (The Sequel)" (July/August 2019 issue).

Read the award-winning articles at https://investmentsandwealth.org/about-us/awards/award-recipients.