

Contact information of person submitting the nomination:

First Name:

Last Name:

Company:

Job Title:

Work Phone:

Mobile Phone:

Work Address:

NOMINEE INFORMATION:

Financial institution name:

Technology provider name (if nominating a financial institution):

Introduction of financial institution:

Business unit description within the financial institution (Please provide brief description of your business unit):

Category selection (Please pick the most relevant category for your submission):

- Product Innovation
- Client Engagement
- Advisor Enablement
- Technology Transformation
- Holistic Advice and Planning
- Wealthtech Startup
- Artificial Intelligence

INITIATIVE DETAILS:

What? Detailed description of the initiative and intended goals being submitted for nomination. Please provide an overview of what the submitted initiative is, as well as its key features:

Why? Market challenges driving initiative:

Market opportunities driving initiative:

Detailed description of why this initiative is innovative:

How? (Details on Implementation)

Replacing existing or implementing something new:

- Replacing Existing
- Implementing Something New

Internal Build, Proprietary Configuration of Vended Solutions/APIs, or Single Vendor Solution

- Internal Build
- Proprietary Configuration
- Vendor Solution

If internal build, why internal build?:

If a Proprietary Configuration of Vended Solutions/APIs, list what vendors and solutions were incorporated, and provide details on how you approached configuration (ex. configured a CRM platform's UI using wizards and widgets for use as a portal and integrated data from other solutions via API):

If vendor solution, describe vendor selection process (other vendors analyzed, selection criteria, key reasons for vendor selection):

Deployment decision (on-premise, hosted, private cloud, public cloud, hybrid cloud, via a managed service arrangement, or any combination):

Consulting/IT services partners if any for implementation (e.g., Accenture, PWC, Capgemini, Infosys, TCS, Wipro, etc.)

Detailed Timeline - Please provide details on key stakeholders, the ideation and development processes, key milestones, and launch date:

Key Success Factors:

Post-implementation vendor assessment (strengths, weaknesses, future roadmap - 12 to 24 months):

RESULTS:

Quantitative assessment/metrics of initiative:

Qualitative assessment/metrics of initiative:

Future initiative roadmap and goals:
