NEWS

For Immediate Release

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Impact Communications and Fifteen Impact Clients Named Finalists in 2026 Wealthies and Luminaries Awards Programs

Finalist nods for Impact and clients total 19 for the Wealth Management Industry Awards and 34 for the ThinkAdvisor Luminaries Awards

LEAWOOD, KS (August 28, 2026) – Impact Communications, a full-service marketing and PR agency exclusively serving wealthtech, financial services, and independent financial advisory firms, today announced that it has been named a finalist in both the 2026 *Wealth Management* Industry Awards (the "Wealthies") and the 2026 *ThinkAdvisor* Luminaries Awards – two of the most prominent and respected awards programs in the wealth management industry.

In the Wealthies competition, Impact was named a finalist for Digital Campaign of the Year, while 9 current and former clients also received finalist nods – totaling 19 in all. In the Luminaries program, Impact earned finalist recognition in the Educational Programs category, while 12 current clients were also named finalists across 34 total categories.

WEALTHIES FINALIST FOR CLIENT DIGITAL CAMPAIGN OF THE YEAR

Impact Communications was named a Wealthies finalist in the Marketing/PR Firms – Client Digital Campaign of the Year category for its work on StraightLine's "Financial Snack" digital education series. Developed in collaboration with StraightLine Group, LLC, the campaign translates technical financial planning questions into concise, visually engaging, and easily discoverable content across LinkedIn, Facebook, and Instagram.

Each installment is developed in partnership with a rotation of StraightLine advisors, who answer common financial planning questions on topics ranging from Roth strategies and required minimum distributions (RMDs) to market volatility and estate planning. The educational series has generated thousands of digital impressions and engagements, establishing a repeatable framework for simplifying complex financial concepts into shareable content while maintaining accuracy and credibility.

The Wealthies winners will be announced on September 10th, 2026, at Cipriani 42nd Street in New York. Impact founder and CEO, **Marie Swift**, and **Dori Thomas**, Brand Strategy Director and Senior Relationship Manager, will attend the afternoon executive summit and evening awards ceremony with 18 Impact clients, VIPs, and industry peers.

To view the full list of finalists in the 2026 *Wealth Management* Industry Awards, please click here.

LUMINARIES FINALIST FOR EDUCATIONAL PROGRAMS

Impact Communications was also named a Luminaries finalist in the Marketing & PR Services – Educational Programs category for the integrated educational communications strategy it developed in conjunction with StraightLine.

The program connects StraightLine's advisor-authored Financial Snack series with its Roadmap Series of blogs, videos, email communications, social media content, and seasonal campaigns. Together, these initiatives create an evergreen educational ecosystem designed to meet people where they are, make credible and experience-based financial education more approachable, preserve the authenticity of advisor knowledge, and improve discoverability across traditional search engines, answer engines, and AI-powered search experiences.

Jonny Swift, President & COO of Impact Communications, will attend the New York awards ceremony with **Marie Swift** on December 3rd, 2026, alongside several of their clients and industry peers, where the winners will be announced.

To view the full list of finalists in the 2026 *ThinkAdvisor* Luminaries Awards, please click here.

RECOGNITION FOR CLIENTS OF IMPACT COMMUNICATIONS

In addition to earning finalist recognition for its own work, Impact Communications worked alongside its current and former clients to identify their strongest stories, develop strategic positioning, craft compelling narratives, and submit nominations for consideration in the

respective awards programs. Those efforts are reflected in finalist recognition across the 2026 Wealthies and Luminaries Awards.

In the Wealthies awards program, nine current and former Impact clients collectively received 18 finalist nods:

- Advyzon, a comprehensive wealth management technology and data platform for financial advisors and investment managers, was named a finalist in 5 categories: Unified (All-in-One) Systems, CRM, Innovation Platforms, Digital Marketing Campaign of the Year, and CMO of the Year (**Samantha Schwimmer**)
- Advyzon Investment Management (AIM), a seamlessly unified investment solutions platform within Advyzon, was recognized in 2 categories: TAMPs and Model Marketplaces
- Auria by Advyzon, a new product offering from Advyzon purpose built for the needs of family offices and UHNW clients, was named a finalist in 2 categories: Family Offices Client Initiative and Technology Disruptors
- Dunham & Associates Investment Counsel, Inc., an RIA and broker-dealer serving independent financial advisors, was recognized in 3 categories: Advisor Service and Support, Thought Leader of the Year (**Adem Tumerkan**), and CMO of the Year (**Salvatore M. Capizzi**)
- The Oasis Group, a consultancy and research firm serving wealth management firms nationwide, was named a finalist in 2 categories: Industry Research Providers and Professional Services Firms CEO of the Year (**John O'Connell**)
- Kwanti, a portfolio analytics solution aiding financial advisors and investment managers with prospect conversion, client retention, model management, and proposal generation, was recognized as a finalist in the Model Marketplaces category
- Syntax Data, a financial data and technology provider offering data-optimized index solutions, was named a finalist in the Direct Indexing category
- EncorEstate Plans, a comprehensive and customizable estate planning and trust funding solution for advisors, was recognized as a finalist in the Estate Planning Thought Leadership category
- YCharts, an investment research and client engagement platform for financial professionals, was named a finalist in the Portfolio Analytics category

With a combined nine categories between Advyzon, Auria, and Advyzon Investment Management (AIM), Advyzon had the most finalist nods of any single organization in this year's Wealthies program.

In the Luminaries awards program, twelve Impact clients collectively received 33 finalist nods:

- Advyzon was named a finalist in 4 categories: Investment Management, Operations, Client Engagement, and CMO of the Year (**Samantha Schwimmer**)
- Advyzon Investment Management (AIM) was recognized in 2 categories: TAMPs & Model Marketplaces and Chief Investment Officer of the Year (**Brian Huckstep**)
- Syntax Data was named a finalist in 6 categories: Investment Management, Operations, Client Engagement, Financial Planning, Thought Leadership & Education, and AI Innovation & Impact
- Libretto, an innovative advice platform for RIAs and family offices that unifies financial planning, total wealth portfolios, and risk management, was recognized in 5 categories: Financial Planning, Investment Management, Operations, Client Engagement, and Thought Leadership & Education
- Dunham & Associates Investment Counsel, Inc. was named a finalist in 4 categories: Thought Leadership & Education, Thought Leader of the Year (**Salvatore M. Capizzi**), CMO of the Year (**Salvatore M. Capizzi**), and Wholesaler of the Year (**Robert L. Pancrazi**)
- Gertsema Wealth Advisors, an independent SEC Registered Investment Adviser and financial planning firm based in Saint Joseph, Missouri, was recognized in 3 categories: Thought Leadership & Education, Thought Leader of the Year (**Nicholas Gertsema**), and Luminaries With Heart (**Cristina Wiebelt-Smith**)
- YCharts was named a finalist in 2 categories: Investment Management and CEO of the Year (**Sean Brown**)
- Brookwood Investment Group, a nationally recognized, independent RIA firm committed to redefining advisor independence through an advisor-centric, fiduciary-first platform, was recognized in 2 categories: Product / Service Innovation among RIAs and CEO of the Year (**Kimberley Raimondo**)
- Kwanti was named a finalist in 2 categories: Investment Management and Operations
- Blue Vault, an aggregator of alternative investment performance data and analysis, was recognized as a finalist in the Investment Management category
- StraightLine, an independent SEC Registered Investment Adviser and financial planning firm based in Troy, Michigan, was named a finalist in the Thought Leadership & Education category
- Softlab360, a specialty consulting and software engineering firm that works with financial services firms, was recognized as a finalist in the Investment Management category

ABOUT THE WEALTH MANAGEMENT INDUSTRY AWARDS

Honoring the individuals, organizations, and companies that help financial advisors build better businesses and create better outcomes for their clients, the 12th iteration of the event in 2026 received a record-breaking 1,392 nomination entries from over 500 companies. The awards are judged by a panel of independent judges made up of top names in the industry and overseen by

Wealth Management editor-in-chief David Armstrong. A "winners circle" celebration will be held at Cipriani in New York on September 10th, 2026. To learn more and see the full list of 2026 Wealth Management Industry Awards finalists, please click here.

ABOUT THE THINKADVISOR LUMINARIES AWARDS

Launched in 2021, ThinkAdvisor's Luminaries Awards redefine excellence in financial services, shining a spotlight on outstanding contributions from both organizations and individuals. By setting a new standard for recognition based on remarkable achievements and innovation, the ThinkAdvisor 2026 Luminaries Awards program inspires the industry to reach greater heights of leadership, creativity, and community engagement. A panel of independent judges made up of distinguished industry professionals will determine the 2026 winners, who will be recognized during an awards ceremony at the New York Hilton Midtown on December 3rd, 2026. To learn more and see the full list of ThinkAdvisor 2026 Luminaries finalists, please click here.

ABOUT IMPACT COMMUNICATIONS, INC.

Founded in 1993 by financial services communications strategist Marie Swift, Impact Communications is a specialized marketing communications and PR firm exclusively serving wealth management, financial services, and wealthtech organizations. Impact works with a select group of firms and industry leaders to clarify their vision, strengthen their stories, build trust, and create sustained marketplace momentum. Through strategic counsel, executive positioning, branding, hyper-relevant thought leadership, earned media visibility, and digital communications designed to engage target audiences, Impact helps clients increase marketplace visibility, strengthen credibility, and realize meaningful business outcomes. Impact and its leadership have earned numerous industry honors and recognitions for excellence in communications, marketing, public relations, thought leadership, and industry leadership. Learn more at www.ImpactCommunications.org.

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