

NEWS

For Immediate Release

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Kwanti Wins WealthManagement.com Industry Award for Portfolio Analytics

In addition, Kwanti named a finalist in the ThinkAdvisor 2024 Luminaries Awards

SAN FRANCISCO, CA (September 24, 2024) – [Kwanti](#), a portfolio analytics solution aiding financial advisors and investment managers with prospect conversion, client retention, model management, and more, was named the winner of the ‘Portfolio Analytics’ award in the Technology Providers category of the [2024 WealthManagement.com Industry Awards](#) – an annual competition and industry-leading awards program often referred to as ‘The Wealthies’.

“From humble beginnings sixteen years ago to this prestigious award – credit goes to our terrific team at Kwanti that’s passionate for product excellence and customer success, and to our loyal users and partners that push us every day to do better,” said Christophe Gauthron, CEO of Kwanti. “We celebrate this victory, but we won’t rest on these laurels. We have more innovation coming and exciting plans moving forward!”



The firm was recognized at the tenth annual Industry Awards ceremony and gala, held on September 5th, 2024, at the Ziegfeld Ballroom in New York City, with Gauthron attending the ceremony and accepting the award. The evening red carpet, cocktail reception, and black-tie awards ceremony was attended by more than 500 industry executives and team members from leading asset management firms, RIAs, B/Ds, custodians, technology providers, and other industry-related companies.

Kwanti's industry-leading portfolio analytics solution aids financial advisors and investment managers with prospect conversion, client acquisition and retention, model management, and much more by delivering portfolio analytics, investment performance data, stress testing, and proposals. The intuitive, web-based interface allows investment advisors to balance serving clients well and managing portfolios with data-driven expertise by combining powerful analytics and proposal generation designed to optimize time and resources.

In recent years, Kwanti added groundbreaking new features including [Kwanti Screener](#) to allow advisors to screen for best performing assets and find the right investment opportunities for clients, [Tax Drag Analysis](#) to allow advisors to identify hidden portfolio expenses and tax liability, [Model Portfolio Tracking](#) to allow advisors to add a model portfolio's history of changes to achieve a more realistic illustration and performance calculation, and more, with more new features and enhancements coming soon. In addition, Kwanti added [new models](#) from leading asset managers, new [Target Risk Indexes](#), and [Collective Investment Trust \(CIT\) data](#), and introduced integrations with [Betterment for Advisors](#) and [Altruist](#), as well as an enhanced integration with [Advyzon](#).

In addition to winning the 'Portfolio Analytics' award, Kwanti was also named a finalist in the 'Model Marketplaces' category of The Wealthies – highlighting Kwanti's robust Model Marketplace, which now boasts 105 diverse models from top providers, including BlackRock, State Street, WisdomTree, Fidelity, Wilshire, and more. All models are accessible directly within Kwanti at no additional cost.

In this year's Wealthies, 92 awards were presented to 84 companies from a pool of 287 finalists. Winners were chosen by an independent panel of industry judges and honored the best companies, individuals, and organizations that support financial advisor success. The finalists were culled down from more than 1,000 entries from more than 400 companies, and 104 firms were recognized for outstanding achievement in multiple categories – including Kwanti.



To see the full list of winners and finalists, and to learn more about the 2024 *WealthManagement.com* Industry Awards, [please click here](#).

KWANTI NAMED A FINALIST IN THINKADVISOR 2024 LUMINARIES AWARDS

In addition, Kwanti was recently named a finalist in the [ThinkAdvisor 2024 Luminaries Awards](#) among Technology Platforms, Products and Services, making the final cut for the Investment Management Firm Award in Innovation – highlighting the firm's leading portfolio analytics solution alongside their robust Model Marketplace. The Luminaries Awards recognize the visionary firms and individuals driving innovation and making a transformative impact on both the industry and the profession.

“We’re thrilled to be recognized in both of these industry-leading awards programs,” said Patric Glassell, Head of Sales at Kwanti. “This recognition underscores our team’s dedication and the ongoing enhancements we make to our platform to best support our advisors and their clients.”

The 2024 Luminaries program will culminate at the 4th Annual *ThinkAdvisor* Luminaries Awards dinner and gala on Wednesday, December 11th in Las Vegas. To see the full list of finalists and to learn more about the *ThinkAdvisor* 2024 Luminaries, [please click here](#).

ABOUT KWANTI

Founded by Christophe Gauthron, CFA®, and based in San Francisco, California, Kwanti is a portfolio analytics solution aiding financial advisors and investment managers with prospect conversion, client acquisition and retention, model management, and much more by delivering portfolio analytics, investment performance data, stress testing, and proposals. The intuitive, web-based interface allows investment advisors to balance serving clients well and managing portfolios with data-driven expertise by combining powerful analytics and proposal generation designed to optimize time and resources. To learn more about Kwanti, visit www.Kwanti.com.

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