

# Investments & Wealth Institute Awards

RECOGNIZING THE BEST IN THE INVESTMENT AND WEALTH MANAGEMENT INDUSTRY

By Maureen Walker



(A) A. Craig MacKinlay, winner of the 2022 Investment Consulting Impact Award; (B) Michael E. Kitces, winner of the 2022 Wealth Management Impact Award; (C) Jonathon Zytneck, winner of the 2022 Governance Insight Award; (D) Mikkaela Salamatina, winner of the 2022 Governance Insight Award Honorable Distinction; (E) Jennifer Gongola, (F) Sean Klein, (G) Rene Martel, and (H) Avi Sharon, winners of the 2022 Journal Research Award; (I) Dana Anspach, winner of the 2022 Writing Award; (J) Morgan Pearsall, winner of the 2022 Writing Award Honorable Distinction

The Investments & Wealth Institute presented five awards recognizing outstanding contributions to the investment and wealth management body of knowledge during a special awards ceremony at the Institute's flagship annual conference, ACE Academy, in Nashville, Tennessee, on May 16, 2022.

## 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 advances in the advisor skill set.

The 2022 honoree is **A. Craig MacKinlay, PhD**. MacKinlay is the Joseph P. Wargrove Professor of Finance and academic director of

the Jacobs Levy Center at The Wharton School of the University of Pennsylvania. He has taught in the Certified Investment Management Analyst® (CIMA®) certification program at The Wharton School for 35 years. MacKinlay has served as a member of the *Journal of Investment Consulting* Editorial Advisory Board since its inception and is a strong advocate for advanced investment management education.

## 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 2022 recipient is **Michael E. Kitces, MSFS, MTAX, CFP®, CLU, ChFC, RHU, REBC, CASL**. Kitces is head of planning strategy at Buckingham Strategic Partners, a turnkey wealth management services provider supporting thousands of independent financial advisors. He is

a prolific author, blogger, podcaster, and a well-known industry pundit. Kitces has taught dozens of CPWA classes over the past 10 years and now teaches within the Retirement Management Advisor® (RMA®) certification program.

## GOVERNANCE INSIGHT AWARD

The Governance Insight Award honors the author(s) of a written work (e.g., article, paper, book) published in the previous year that has made significant contributions in ethics, legal, regulatory, or other relevant areas that affect the investment and wealth management professions.

The 2022 recipient is **Jonathon Zytneck, JD, PhD**, for the article, "Do Mutual Funds Represent Individual Investors?" (<https://ssrn.com/abstract=3803690>). Zytneck is a post-doctoral fellow at the Institute for Corporate Governance and Finance at New York University School of Law and will be joining the faculty of Georgetown University Law Center in the fall of 2022.

The honorable distinction recipient is **Mikkaela Salamatina, JD**, for the article, "Balancing Innovation and Protection: Understanding the Landscape for DeFi Regulation" (<https://ssrn.com/abstract=3918656>).

Salamatin is an associate in the New York office of Norton Rose Fulbright, an international law firm. Her practice includes regulatory investigations, sanctions, and litigation work.

**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 2022 recipients are **Jennifer Gongola, PhD**, research manager, behavioral science at PIMCO; **Sean Klein, PhD**, executive vice

president, quantitative research analyst at PIMCO; **Rene Martel, FSA**, managing director, head of retirement at PIMCO; and **Avi Sharon, PhD**, executive vice president, product strategist at PIMCO, for the article, “Managing Misbehavior: Rational Choice in an Uncertain Retirement” (*Retirement Management Journal*, Vol. 10, No. 1, 2021).

**INVESTMENTS & WEALTH INSTITUTE WRITING AWARD**

This award honors Investments & Wealth Institute members for their excellent editorial contributions to the *Investments & Wealth Monitor* during the previous year. The 2022 recipient is **Dana Anspach, CFP®, RMA®**, founder and chief executive officer of Sensible Money, LLC. for the article, “Demonstrating Advisor Gamma

Through the Household Balance Sheet” (*Investments & Wealth Monitor*, November/December 2021).

The honorable distinction recipient is **Morgan Pearsall, CFP®, CIMA®**, a principal advisor with JMG Financial Group, for the article, “Defeating Retirement: A New Approach to Retirement Asset Allocation” (*Investments & Wealth Monitor*, September/October 2021).

Learn more about the Institute’s awards and read the award-winning articles at <https://investmentsandwealth.org/about-us/awards>. ●

*Maureen Walker is the Institute’s director of communications. Contact her at [mwalker@i-w.org](mailto:mwalker@i-w.org).*