Investments & Wealth Institute Awards Recognize Outstanding Achievements

By Devon Coquillard

The Investments & Wealth Institute presented five prestigious awards at its 2019 Annual Conference Experience in Las Vegas on May 7, 2019.

INVESTMENT CONSULTING IMPACT AWARD
Margaret M. Towle, PhD, is the 2019 recipient of the Investment Consulting Impact Award for her outstanding contribution and demonstrated commitment to the field of investment consulting. Towle has been an influential driver of the adoption of impact investing and has advanced thought leadership throughout the investment consulting profession through a variety of high-profile roles. As chair of the Investments & Wealth Monitor editorial advisory board from 2004 to 2008, she was instrumental in expanding the publication to include more peer-reviewed contributions. Towle became editor-in-chief of the Journal of Investment Consulting in 2009, and she now serves as managing member of Yakima River Partners, LLC, and as an advisory committee member for the University of Oxford Said Business School Impact Investment Programme. Her career spans many organizations, including Bank of America Merrill Lynch, Hightower, and GreyCourt & Co. Towle also served as executive vice president and chief investment officer for Northern Trust Global Advisors.

WEALTH MANAGEMENT IMPACT AWARD
This award honors individuals who have contributed to 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 2019 recipient is Tim Kochis, founder of Kochis Global and former chief executive officer and chairman at Aspiriant. Kochis has had a tremendous influence on the development of the financial planning profession through his service in professional and educational organizations. He also was a long-time volunteer for the CFP Board of Standards, including service as chairman of the board of examiners and the board of directors. Kochis is a co-founder of the Personal Financial Planning Program at University of California, Berkeley, one of the first accredited financial planning programs in the United States, where he taught for 18 years. He is the author of the book Managing Concentrated Stock Wealth: An Adviser’s Guide to Building Customized Solutions (2nd edition, 2015). Kochis was an early instructor for the CPWA certification program at The University of Chicago Booth School of Business.
GOVERNANCE INSIGHT AWARD
The Governance Insight Award honors the author of a written work that has made a significant contribution to advancing the understanding and knowledge of investment and wealth management, including the areas of ethics and legal and regulatory issues.


The Awards Committee also recognized Mark Harbour, CPA, CIMA®, CFA®, business development director, Morgan Stanley, with an Honorary Governance Insight Award for his thought leadership and lifetime contributions on the topic of governance and ethics.

JOURNAL RESEARCH AWARD
Stephen Huxley, PhD, chief investment strategist and founding partner of Asset Dedication, and Brent Burns, president and founding partner of Asset Dedication, received the 2019 Journal Research Award. Huxley and Burns were recognized for their paper, “Safety Zones, Danger Zones, and the Critical Path: Visualizing U.S. Asset Class Returns Based on Time Horizons, Size, and Style.” The 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 Retirement Management Journal.

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 Investments & Wealth Institute honored Todd Taylor, managing director and head of marketing, strategy, and analytics at New York Life; Nick Halen, director and head of business development and research at New York Life; and Dylan Huang, senior managing director and head of retail annuities at New York Life, for their article, “The Decumulation Paradox: Why Are Retirees Not Spending More?” which appeared in the July/August 2018 issue. The Awards Committee also recognized Bob Rice, managing director at Tangent Capital and Rice Partners, with an honorable distinction for his article, “Implications for Advisors: Quantitative Easing to Quantitative Tightening,” which appeared in the September/October 2018 issue.

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

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