



We are thrilled to share some exciting news: United Planners has been named a finalist for the 2024 Wealth Management Industry Awards, affectionately known as the “Wealthies”! This prestigious recognition celebrates a decade of honoring companies, individuals, and organizations that demonstrate outstanding achievement in support of financial advisor success.

With over 400 companies submitting entries across 92 award categories, totaling more than 1,000 submissions, United Planners is honored to be named a Finalist in 4 categories!

In the category of Broker-Dealers (individual recognition) our very own President & Chief Executive Officer, **Michael A. Baker**, has been selected as one of three **finalists for Chief Executive of the Year!**

In the Broker-Dealer (fewer than 1,000 advisors) category, United Planners achievements shine through in the following areas:

- **Digital Marketing Campaign of the Year – Yes, It’s True Campaign**
- **Practice Management – LEAPS Program**
- **Corporate Social Responsibility - ReachUP**

An independent panel of judges selected 287 finalists and will announce the winners live in New York City on September 5th.

You can view the full finalist list [here](https://informaconnect.com/wealth-management-industry-awards/2024-finalists/). (https://informaconnect.com/wealth-management-industry-awards/2024-finalists/)

Let's celebrate this remarkable achievement together! #wealthies

Link to the post on LinkedIn:

<https://www.linkedin.com/feed/update/urn:li:activity:7206418059241095168/?actorCompanyId=233597>