

# Vanilla Recognized as Awards Finalist by ThinkAdvisor and WealthManagement.com

*Vanilla included among 2023 honorees for its innovative estate advisory platform*

SALT LAKE CITY, UTAH, UNITED STATES, July 19, 2023 /EINPresswire.com/ -- Vanilla, a leading provider of [estate planning software](#), today announced its inclusion as a 2023 finalist in both the WealthManagement.com Industry Awards and the ThinkAdvisor LUMINARIES Awards.

Each year, these award programs celebrate achievement and innovation across the financial services industry.

In the eligibility period during which the awards are evaluated, Vanilla has accelerated the development of its platform and scaled the pace of new customer adoption. These efforts include the [introduction of the Vanilla Estate Advisory Platform](#), a comprehensive, fully-digital estate planning platform purpose built for advisors, by advisors. From robust and easy-to-

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We're honored to be among the finalists recognized for moving the industry forward in 2023. Vanilla's modern estate planning platform helps advisors connect to clients in a whole new way.”

*Gene Farrell, CEO, Vanilla*

understand visualizations to detailed diagrams of how assets transfer to future generations, Vanilla is reinventing the estate planning experience with innovative technology, design, and industry-leading expertise.

“We're honored to be among the finalists recognized for moving the industry forward in 2023,” said Gene Farrell, CEO, Vanilla. “Vanilla's mission is to build the complete platform for modern estate planning. We are laser focused on helping advisors guide their clients through ongoing estate planning conversations by simplifying and standardizing the experience. With Vanilla, financial

advisors are deepening client relationships, expanding share of wallet and winning new business with a differentiated offering.”

The Vanilla logo, featuring the word "Vanilla" in a bold, black, sans-serif font with a registered trademark symbol.The WM Industry Awards logo, featuring the letters "WM" in a stylized blue font, followed by the words "Industry Awards" in a blue, sans-serif font.

Vanilla is a finalist for the WealthManagement.com 2023 Wealthies Award.

Vanilla was selected as a Finalist in the Financial & Investment Innovation category by the ALM ThinkAdvisor LUMINARIES Awards for its Class of 2023 honorees, and as a Finalist in multiple Technology Providers categories — both Innovation Platforms and Specialized Planning Application — by The WealthManagement.com 2023 Industry Awards.

The ThinkAdvisor LUMINARIES Awards aim to honor the absolute best the profession has to offer, recognizing the individuals and firms taking creative, bold steps to change the investment advisory industry where it matters most. The WealthManagement.com 2023 Industry Awards, now in its ninth year, celebrate the companies, individuals and organizations that demonstrate outstanding achievement in support of financial advisor success, recognizing those bringing new innovations to market that make a real difference to the daily activities of financial advisors.

“Estate planning is a core pillar of the value advisors provide to their clients, but historically advisors have lacked the resources they need to offer that strategic guidance at scale,” said Farrell. “Since launching in 2019, we have been modernizing how clients think about building their legacy, and helping advisors deliver a differentiated offering. Our deep focus on customer success has helped us serve the needs of all our customers from the largest enterprises to small RIAs. We are proud to take these customer insights to create a world where advisors are empowered to advise clients on estate planning as part of their holistic wealth advisory.”

#### About Vanilla

Vanilla is a leading provider of [estate planning software for advisors](#). Vanilla transforms traditional estate planning into a modern, comprehensive estate advisory experience. Its platform brings together innovative technology, design, and industry-leading expertise. By reimagining the outdated, complex legacy estate planning process, Vanilla allows advisors to deliver differentiated advice, foster meaningful customer interaction, and provide a more expansive total wealth advisory offering so they can win new business, increase retention, and grow assets under management over time.

Learn more about Vanilla at [justvanilla.com](https://www.justvanilla.com)

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