

Vanilla Wins Best Financial Planning Award from WealthTech Americas

Latest award win highlights innovative estate planning technologies within Vanilla platform, including VAI and Vanilla Scenarios

SALT LAKE CITY, UTAH, UNITED STATES, February 22, 2024 /EINPresswire.com/ -- Vanilla, a leading provider of innovative estate planning software, has been named winner of the Financial Planning (US) category at the WealthBriefing WealthTech Americas Awards.

The annual award program is organized by WealthBriefing and its sister publications WealthBriefingAsia and Family Wealth Report, recognizing achievements across the wealth management industry. The awards are designed to showcase outstanding firms and individuals that have demonstrated innovation and excellence during the last year, as evaluated by an esteemed panel of independent judges

Vanilla's win in the Financial Planning (US) category honors "a technology tool provided to the US wealth management sector to enhance and automate financial planning." According to WealthBriefing, Vanilla was deemed a standout innovator for its introduction of [VAI™](#), a proprietary AI model purpose-built to enable ongoing advisor and client education, improve plan implementation, and proactively identify relevant changes in laws and regulations. Judges also applauded [Vanilla Scenarios™](#), which models multiple estate planning scenarios now and in the future to illustrate the impact of planning.

"We are thrilled to be recognized by WealthBriefing with this award," said Gene Farrell, CEO, Vanilla. "Vanilla's mission is to transform estate planning into a modern estate advisory experience. This win underscores our commitment to excellence and innovation as we continue building a scalable, comprehensive solution that enhances client relationships, and drives long-



WealthTechAmericas
AWARDS 2024

brought to you by **WealthBriefing**

WINNER
Financial Planning (US)

Vanilla

Vanilla has been named winner of the Financial Planning (US) category at the WealthBriefing WealthTech Americas Awards.



term value for our customers and their clients.”

"Every winning entrant has been subjected to a rigorous and independent judging process and should be rightly proud of the success they have achieved this year," said Stephen Harris, ClearView Financial Media's CEO, and publisher of WealthBriefing. "I offer my congratulations and best wishes for the future to all winners and highly-commended firms—they are all worthy recipients who join the prestigious list of wealth management professionals who form the global elite of WealthBriefing winners."

Since the evaluation period for the WealthTech Americas 2024 award, [Vanilla has introduced additional solutions](#) that incorporate VAI—including VAI Chat, Collaborative Onboarding, and the expanded availability of Vanilla Document Builder™—harnessing artificial intelligence to enhance the estate planning experience at scale.

For more information about the Vanilla Estate Advisory Platform, visit justvanilla.com.

About Vanilla

Vanilla is the world's first Estate Advisory Platform, purpose-built by advisors and estate professionals to help wealth management firms deliver a holistic, modern estate planning experience to their clients. With Vanilla, advisors, planners, and estate attorneys can deliver differentiated advice, expand their client relationships, win new business, and increase their ongoing value by offering simplified, scalable estate analysis to every client. Learn more about how Vanilla is reinventing the estate planning experience, end-to-end at www.justvanilla.com.

About ClearView Financial Media Ltd ("ClearView")

ClearView Financial Media was founded by Chief Executive, Stephen Harris in 2004, to provide high quality 'need to know' information for the discerning private client community. London-based, but with a truly global focus, ClearView publishes the WealthBriefing group of newswires, along with research reports and newsletters, while also running a pan-global thought-leadership events and awards programme.

Media Inquiries

Vanilla

press@justvanilla.com

Visit us on social media:

[Twitter](#)

[LinkedIn](#)

[YouTube](#)

This press release can be viewed online at: <https://www.einpresswire.com/article/690307997>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire,

Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2024 Newsmatics Inc. All Right Reserved.