

# MTM Technology Named Finalist in the 2026 Wealth Management Industry Awards for Advancing Family Stewardship

*Recognition Highlights a New Approach to Multi-Generational Family Stewardship*

BALTIMORE, MD, UNITED STATES, June 10, 2026 /EINPresswire.com/ -- MTM Technology today announced that its Family Stewardship Technology

platform, [MTM360](#), featuring ROE (Relationship Optimization Expert), has been named a finalist in the Specialized Planning Applications category of the 2026 Wealth Management Industry Awards, one of the financial services industry's most respected recognitions for innovation and excellence.



Wealth Management Industry Awards

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*Roey Diefendorf*

The Wealth Management Industry Awards honor organizations that are transforming the future of wealth management through innovative solutions that create meaningful impact for advisors, clients, and families. Being named a finalist places MTM Technology among a select group of organizations recognized for pioneering new approaches that help advisors, family offices, and the families they serve achieve enduring success across generations.

Unlike traditional wealth management technologies that focus primarily on managing financial assets, MTM Technology was created to help families build the human infrastructure that sustains personal, social, and financial wealth across generations. Through its MTM360 platform and ROE, the company helps families improve communication, deepen understanding, develop future leaders, and build the governance structures necessary for multi-generational success.

By providing advisors and family offices with greater visibility into family dynamics, communication patterns, leadership readiness, and stewardship development, MTM360 helps expand the advisor's role beyond financial management to support a family's total wealth: personal, social, and financial.

The platform is built on the belief that enduring family success depends not only on financial capital, but also on the stewardship of relationships, values, wisdom, leadership, and shared purpose.

ROE (Relationship Optimization Expert), MTM360's Stewardship Intelligence capability, is designed to support advisors and family members as they navigate their roles within the broader family ecosystem.

ROE engages family members individually while helping them better understand family dynamics, relationship patterns, shared values, responsibilities, and opportunities for contribution. By fostering greater self-awareness and encouraging meaningful engagement with others, ROE helps strengthen trust, deepen understanding, and create alignment.

The MTM360 platform represents a new category of Family Stewardship Technology: private family technology designed to help families strengthen communication, cultivate leadership, align around shared values, and prepare future generations for responsibility. Through guided engagement, personalized insights, and secure collaboration tools, MTM360 helps families turn individual perspectives into shared stewardship and lasting family resilience.

"We believe the future of wealth management extends beyond financial assets alone," said Roey Diefendorf, Managing Partner of MTM Technology. "Families thrive when individuals feel understood, connected, and empowered to contribute to something larger than themselves. We created ROE and MTM360 to help families communicate more effectively, prepare future leaders, preserve shared knowledge, and steward what matters most. This recognition validates our belief that lasting legacies are built through strong relationships, shared purpose, and prepared future generations."

As families navigate the complexities of leadership transition, knowledge transfer, and multi-generational stewardship, MTM Technology remains committed to developing solutions that support both family relationships and long-term family success. The company's recognition as a finalist reflects the growing importance of human, social, and relational capital as essential components of enduring family harmony.

MTM360 helps families steward three dimensions of wealth: personal wealth through stronger relationships and shared purpose; social wealth through philanthropy, charitable giving, and community impact; and financial wealth through responsible stewardship and opportunity across generations.

The recognition reflects a growing industry understanding that the future of wealth management extends beyond financial outcomes alone. Advisors and family offices are increasingly being called upon to help families navigate leadership transitions, prepare future generations, and sustain family success. MTM360 was designed to support that evolution.

Winners of the 2026 Wealth Management Industry Awards will be announced during the awards gala on September 10, 2026, in New York City.

#### About the Wealth Management Industry Awards

Presented by Informa Connect's Wealth Management Group, the Wealth Management Industry Awards, widely known as the "Wealthies," honor organizations, individuals, and initiatives advancing the future of wealth management. Judged by an independent panel of industry leaders and experts, the awards recognize excellence in innovation, impact, execution, and contribution to the profession. With more than 1,300 nominations submitted by over 500 companies in 2026, the program remains one of the industry's most competitive and respected recognitions.

#### About MTM Technology

MTM Technology develops Family Stewardship Technology that helps advisors, family offices, and families address the human dimensions of wealth. Through MTM360 and ROE (Relationship Optimization Expert), the company's Stewardship Intelligence capability, MTM Technology enables families to strengthen relationships, prepare future leaders, and steward personal, social, and financial wealth.

For more information, visit [www.MoreThanMoney360.com](http://www.MoreThanMoney360.com)

Media Contact

Roey Diefendorf

Co-Founder, MTM Technology

Roey@MTM-360.com

[www.MoreThanMoney360.com](http://www.MoreThanMoney360.com)

Monroe Diefendorf, Jr.

MTM Technology, Inc.

+1 646-779-8475

[email us here](#)

Visit us on social media:

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