



News & Press Releases

PKF O'Connor Davies Shortlisted for 3 Family Wealth Alliance Best in the Industry Awards

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PKF O'Connor Davies, LLP, the nation's 29th largest accounting and advisory firm, announced today its Family Office Services Division and leadership team have been shortlisted in three categories for the 2018 Best in the Industry Awards presented by The Family Wealth Alliance. The winners of each category will be announced at The Family Wealth Alliance's Best in the Industry Award Gala held on Oct. 17, 2018, during the Alliance Fall Forum. The Firm has been nominated as a finalist in the following categories:

- Accounting, CPA or Law Firm Serving Family Offices
- Client Experience
- Large Multifamily Office (Executive) - Gemma Leddy

"Our unwavering focus is on providing consistent, superior service to our clients," said Gemma Leddy, CPA and Partner-in-Charge of PKF O'Connor Davies Family Office. "Thoughtful insights combined with best-in-class tools are at the heart of the experience we provide the families we serve. We're proud to be recognized by The Family Wealth Alliance for our unique approach to meeting client needs."

The Firm was recognized for the accounting services it offers family offices, providing greater visibility and deeper insights into a family's operations, investments and philanthropy. In addition, it was shortlisted for its approach to the client experience, which is backed by a full-service public accounting and advisory firm and industry-leading fund administration and accounting software. Leddy, whose vision and leadership has driven the Firm in expanding its family office services, was also nominated in the Large Multifamily Office Executive category.

The Family Wealth Alliance convenes family wealth firms and organizations providing specialty services that, together, serve select private families across North America. The organization also provides thought leadership via Alliance Research.

"Because of the role The Alliance plays within the family wealth industry, we have enjoyed a unique vantage point from which to identify the trailblazers among us," commented Thomas R. Livergood, Family Wealth Alliance Founder and Chief Executive Officer. He added, "In our 15th anniversary

year, this Awards Gala is our opportunity to honor these leaders and celebrate their many contributions to our evolving industry.”

PKF O'Connor Davies Family Office provides a full range of family office, accounting, tax, administration and advanced planning services to high-net-worth individuals, families and their closely held businesses in the United States and abroad. The Firm's single point-of-entry model captures the entire universe of holdings and transactions for a family, and provides customized reporting based on family needs.

PKF O'Connor Davies has nine offices in four states and continues to expand through organic growth and acquisitions in the Northeast and Washington, D.C. region. It's supported this growth with a strategic combination of promoting from within coupled with tactical external hires.

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