



News & Press Releases

PKF O'Connor Davies Shortlisted for 6 Family Wealth Report 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 six categories for the Family Wealth Report Awards 2019. The awards showcase exceptional providers in the global private banking, wealth management and trusted advisor communities. Winners will be announced at a gala held at the Mandarin Oriental hotel in New York on March 20, 2019. The Firm has been named a finalist in the following categories:

- Tax Advice
- Philanthropy Advice
- Solutions for International Americans
- Family Office Division Management Consultancy
- Accountancy Advice
- Innovative Client Solution – Other Wealth Management Organization

"Our top priority is to provide superior service to our clients in every interaction with the Firm," said Gemma Leddy, CPA and Partner-in-Charge of PKF O'Connor Davies Family Office. "Being recognized for this ongoing commitment and dedication is always an honor. We'll continue to provide that dedication to the families who put their trust in our advice and solutions."

The Firm was recognized for the accounting services it offers clients, providing greater visibility and deeper insights into a family's operations, investments and philanthropy. PKF O'Connor Davies Family Office tax experts were also honored. They specialize in personalized strategic tax consulting, tax mitigation, SALT, sales and use tax, estate planning, philanthropy, gifts, international tax and tax-efficient structuring of family offices. The team provides effective long-term planning by staying ahead of tax law changes and connecting tax advice to accounting and reporting insights. In addition, it was shortlisted for its approach to performance, which is backed by a full-service public accounting and advisory firm and industry-leading fund administration and accounting software.

"The firms who have been shortlisted in these awards are all worthy competitors, and I would like to extend my heartiest congratulations," said Stephen Harris, ClearView Financial Media's CEO and Publisher of Family Wealth Report. "These awards are judged solely on the basis of entrants'

submissions and their response to a number of specific questions, which had to be answered focusing on the client experience, not quantitative performance metrics. That is a unique, and I believe, compelling feature. These awards will recognize the very best operators in the private client industry, with 'independence', 'integrity' and 'genuine insight' the watchwords of the judging process – such that the awards truly reflect excellence in wealth management. Our aim is to make these annual Awards one of the brightest, and keenly contested highlights in the wealth management calendar."

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 has supported this growth with a strategic combination of promoting from within coupled with tactical external hires.

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