



Putnam Consulting Group

Transform Your Giving. Change The World.

Putnam Consulting Group Named 2024 Family Wealth Report Award Finalist for Third Consecutive Year

For Immediate Release

CLEVELAND, April 15, 2024 – Putnam Consulting Group, a global leader in philanthropic [strategy](#) and [advisement](#) led by Kris Putnam-Walkerly, has been shortlisted as a finalist in the Philanthropy Advice category for the 11th Annual Family Wealth Report Awards. This prestigious recognition marks the third consecutive year the company has been named a finalist, following their win in 2022. The winners will be unveiled on May 2, 2024, at the Gala Ceremony to be held at the Mandarin Oriental Hotel in New York City.

The judging process is conducted by expert panels consisting of 30 judges from family offices, private banks, trusted advisors, consultants, and other service providers. Each judge possesses in-depth knowledge and broad experience in the field. These awards are a testament to the top performers in the private client industry, with a thorough and independent judging process ensuring that excellence in family wealth management and philanthropy is duly recognized.

“This nomination is a reflection of our unwavering commitment to excellence in philanthropy advisement,” said Putnam-Walkerly. “It’s a recognition not just of our firm’s achievements, but of the profound impact our clients are making in communities around the globe. I am deeply honored to stand among the leaders in family wealth management and philanthropy advice for the third year running.”

As the largest wealth transfer in history unfolds, with an estimated \$86 trillion set to be passed down over the next several decades, Putnam-Walkerly underscores the importance of expanding charitable giving planning for wealth advisors. In response, her firm has created a free resource, "[5 Charitable Giving Mistakes That Cost Advisors Money](#)," specifically tailored for advisors of ultra-high-net-worth clients. This guide aims to assist advisors in confidently expanding their philanthropic service offerings and supporting their clients' charitable giving goals.

"As we witness the largest wealth transfer in history, the role of strategic philanthropy has never been more critical," states Putnam-Walkerly. "Our mission is to ensure that every dollar given is a step towards solving the world's most pressing issues, making philanthropy not just an act of generosity, but a catalyst for real change."

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About Putnam Consulting Group: [Putnam Consulting Group](#) is a global philanthropy consultancy that assists ultra-high-net-worth families, private foundations, family offices, and wealth advisors in making a significant impact with their charitable giving.

For 25 years, leading philanthropists have entrusted Putnam Consulting Group and President Kris Putnam-Walkerly to transform their giving and elevate their impact. Services include strategic advising, bespoke consulting, philanthropic strategy development, succession planning, and executive coaching. Clients include prominent names such as the Charles and Helen Schwab Foundation, Robert Wood Johnson Foundation, David and Lucile Packard Foundation, Walton Family Foundation, Winthrop Rockefeller Foundation, Fujitsu, J.M. Smucker Company, Annie E. Casey Foundation, American Endowment Foundation, and numerous others, including families and foundations that prefer anonymity.

Kris is an award-winning author, speaker, and advisor. Her latest book is [*Delusional Altruism: Why Philanthropists Fail To Achieve Change and What They Can Do To Transform Giving*](#) (Wiley). Kris regularly contributes expert philanthropic commentary to leading media outlets such as [Forbes.com](#), Wall Street Journal, Washington Post, Bloomberg, NPR's Morning Report, Robb Report, Stanford Social Innovation Review, The Chronicle of Philanthropy, Family Office Magazine, Variety, Thrive Global, Financial Advisor Magazine, WealthManagement.com, ThinkAdvisor, Worth Magazine, and more.

Learn more at putnam-consulting.com.

CONTACT: Kris Putnam-Walkerly at +1-800-598-2102 or kris@putnam-consulting.com.

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