



Putnam Consulting Group

Putnam Consulting Group Shortlisted for Prestigious Family Wealth Report Award in Philanthropy Advice for Second Year Running

For Immediate Release

CLEVELAND, May 1, 2023 — Global philanthropy consultancy Putnam Consulting Group, led by renowned [philanthropy expert](#) Kris Putnam-Walkerly, has been named a finalist in the Philanthropy Advice category for the [10th Annual Family Wealth Report Awards 2023](#). This marks the second consecutive year the company has received this prestigious recognition, having won the award in 2022. The winners will be announced on May 4, 2023, during the Gala Ceremony at the Mandarin Oriental Hotel in New York City.

Stephen Harris, CEO of ClearView Financial Media and publisher of Family Wealth Report, stated, “The Annual Family Wealth Report Awards recognize the most innovative and exceptional firms, teams and individuals serving the family office, family wealth and trusted advisor communities in North America.”

The expert panel of over 40 judges selects the finalists based on a combination of qualitative and quantitative performance metrics. The awards recognize the top operators in the private client industry. The judging process is thorough and independent, ensuring that these awards genuinely represent excellence in family wealth management and philanthropy.

Reacting to the news, Putnam-Walkerly expressed her delight at being named a finalist for the second year, stating, “It is a great honor to be recognized in the shortlist of finalists, which is a testament to the quality of [philanthropic advice](#) we provide to affluent families, family offices, and family foundations.”

Harris commented, “The firms and individuals in the 10th Family Wealth Report program are worthy competitors, and those who have reached the finalist stage are truly exceptional.”

As the largest wealth transfer in history is underway, with \$80 trillion projected to be passed down over the next 20 years, Putnam-Walkerly emphasizes 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 for advisors of ultra-high-net-worth clients. This guide aims to help advisors expand their philanthropic service offerings confidently and support their clients' charitable giving goals.

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

For over 23 years, leading philanthropists worldwide have trusted Putnam Consulting Group and President Kris Putnam-Walkerly to transform their giving and elevate their impact. Services include trusted advisory, tailored consulting, and strategy development. Clients feature prominent names such as 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, and numerous others, including families and family offices 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 the WSJ, Forbes, 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.

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