Corporate News

Family Wealth Report honors CIBC's Wanda Colburn with "Leading Individual (Multi-Family Office)" award

CHICAGO, MAY 8, 2023—CIBC Private Wealth, US, is proud to announce that Wanda Colburn, managing director, was recognized with *Family Wealth Report (FWR)'s* **Leading Individual (Multi-Family Office)** award. *FWR*, a leading trade publication covering news and other developing stories in North American wealth management, family office and high net worth/ultra–high net worth sectors, announced the award on May 4 at a ceremony in NYC.

"We are pleased to congratulate Wanda for being recognized as FWR's Leading Individual," said John S. "Jack" Markwalter, Jr., CEO of CIBC Private Wealth, US. "Our purpose at CIBC is to bring our clients' ambitions to reality, and Wanda embodies that purpose everyday through her unwavering focus on serving our clients—and the Denver community—with the highest level of care, expertise and integrity."

FWR's awards program recognizes companies, teams and individuals within the banking and wealth management industries that the publication deems best-in-class and that "demonstrate innovation and excellence" in their respective fields. The Leading Individual (Multi-Family Office) award is recognizes an individual who has demonstrated outstanding leadership, innovation and excellence in the wealth management industry. Last year, they conferred the Leading Individual (Multi-Family Office) award to the firm's Vice Chairman, Eric Propper, CFA.

Colburn is a managing director representing CIBC Private Wealth, US in Colorado and the Rocky Mountain region. She has more than 30 years of investment, estate, retirement and financial planning experience, and works with affluent families, individuals, foundations, institutions, and intermediaries. She serves as a board member of Colorado Uplift, is on the Children's Hospital Legacy Planning Advisory Council, and is on the executive board of the Boy Scouts of America Denver Area Council. Colburn is currently a member of the Rocky Mountain Estate Planning Council and served as past president of the Denver Estate Planning Council and the American Lung Association of Colorado. She earned a bachelor's degree from Georgia Southern University, graduating cum laude with university honors, and is an alumnus of the Graduate Institute of Marketing at Louisiana State University.

This is the 12th time that CIBC Private Wealth has received recognition from *FWR.* In previous years, *FWR* has recognized CIBC Private Wealth in the following categories:

- **Leading Individual (MFO)—**Vice Chairman, Eric Propper, CFA 2022
- **Private Client Investment Platform**, 2022, 2021, 2018, 2017
- **Women in Wealth Management—**Senior Equity Trader, Frances Boatwright, 2021
- **Best Multi-Family Office**, 2019, 2015
- **Women in Wealth Management (Individual—WM Organizations), Highly Commended—** Senior Relationship Manager, Kimberly Dwyer**,** 2018
- **Private Client Investment Platform (Highly Commended)**, 2016
- **Leading Individual (Multi-Family Office)—**CEO John S. "Jack" Markwalter, 2018, David L. Donabedian, CFA, 2016
- **Multi-Family Office (Client Initiative)**, 2016

About CIBC

CIBC is a leading North American financial institution with 13 million personal banking, business, public sector and institutional clients. CIBC offers a full range of advice, solutions and services in the United States, across Canada and around the world. In the US, CIBC Bank USA provides commercial banking, private and personal banking and small business banking solutions and CIBC Private Wealth offers investment management, wealth strategies and legacy planning. Visit us at cibc.com/US.

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Disclosures

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Family Wealth Report awards are determined by a panel of judges' review of questionnaires. The categories are focused around three main areas (1) Experts (individuals and teams); (2) Products; and (3) Services for wealth managers and clients/institutions of all sizes and types.

2023*,* *Family Wealth Report*, "Leading Individual (MFO)"
Wanda Colburn was the only 2023 recipient of this award. The award recognizes an individual working in the private client world.

2022, *Family Wealth Report*, "Private Client Investment Platform"
The award recognizes investment platforms specializing in servicing the investment needs of the high net worth community. CIBC Private Wealth was one of seven firms shortlisted and the only recipient of this award.

2022, *Family Wealth Report*, "Leading Individual (MFO)"
Eric Propper, CFA, was one of five candidates shortlisted and the only recipient of this award. The award recognizes an individual working in the private client world.

2021, *Family Wealth Report*, "Private Client Investment Platform"
The award recognizes investment platforms specializing in servicing the investment needs of the high net worth community. CIBC Private Wealth was one of five firms shortlisted and the only recipient of this award.

2021, *Family Wealth Report* "Women in Wealth Management"
The award recognizes women in private banking or wealth management who are an inspiration both to clients and colleagues. Frances Boatwright was one of six individuals shortlisted and the only recipient of this award.

2019, *Family Wealth Report*, "Best Multi-Family Office"
CIBC Private Wealth Management was one of five firms shortlisted for the "Multi-Family Office ($15 billion AuM/AuA and above)" award and was the only award recipient.

2018, *Family Wealth Report,* "Private Client Investment Platform "
CIBC Atlantic Trust was one of eight firms shortlisted and the only firm to receive this award. The award recognizes investment platforms specializing in servicing the investment needs of the high net worth community.

2018, *Family Wealth Report*, "Leading Individual (MFO)"
Jack Markwalter was one of eight candidates shortlisted and the only recipient of this award. The award recognizes an individual working in the private client world.

2017, *Family Wealth Report*, "Private Client Investment Platform "
CIBC Atlantic Trust was one of five firms shortlisted and the only firm to receive this award. The award recognizes investment platforms specializing in servicing the investment needs of the high net worth community.

2016, *Family Wealth Report,* "Multi-Family Office (Client Initiative)"
Atlantic Trust was one of five firms shortlisted and the only firm to receive this award. The award recognizes new initiatives for clients from multi-family offices of any size or reach.

2016, *Family Wealth Report,* "Leading Individual (Multi-Family Office)"
David Donabedian was one of three candidates shortlisted and the only recipient of this award. The award recognizes an individual working in the private client world.

2016, *Family Wealth Report,* "Private Client Investment Platform"— Highly Commended
Atlantic Trust was one of five firms shortlisted for this award and the only firm to be recognized as "highly commended" in this category. The award recognizes investment platforms specializing in servicing the investment needs of the high net worth community.

2015, *Family Wealth Report,* "Best Multi-Family Office"
Atlantic Trust was one of seven firms shortlisted. This award recognizes multi-family offices with a genuinely national reach as determined by a panel of judges' review of firm questionnaires.

2022, *Barron's*, "Top Advisor Rankings by State"
Eric Propper placed 100 out of 120 New York advisors. Rankings are based on assets under management, revenue produced for the firm, regulatory record, quality of practice and philanthropic work as reported to Barron's in a survey.

2021, *Barron's,* "Top Advisor Rankings by State"
Eric Propper placed 87 out of 120 New York advisors. Rankings are based on assets under management, revenue produced for the firm, regulatory record, quality of practice and philanthropic work as reported to Barron's in a survey.

2020, *Barron's,* "Top Advisor Rankings by State"
Eric Propper placed 115 of 120 New York advisors. Rankings are based on assets under management, revenue produced for the firm, regulatory record, quality of practice and philanthropic work as reported to Barron's in a survey.

2019, *Barron's,* "Top Advisor Rankings by State"
Eric Propper placed 103 of 120 New York advisors. Rankings are based on assets under management, revenue produced for the firm, regulatory record, quality of practice and philanthropic work as reported to Barron's in a survey.

2018, *Barron's,* "Top Advisor Rankings by State"
Eric Propper placed 108 of 120 New York advisors. Rankings are based on assets under management, revenue produced for the firm, regulatory record, quality of practice and philanthropic work as reported to Barron's in a survey.

Rankings, ratings or awards may not be representative of any specific client's experience. Any reference to a ranking, rating or an award provides no guarantee for future performance results and is not constant over time. These awards and recognitions may name Atlantic Trust or CIBC Atlantic Trust, which is now part of CIBC Private Wealth.