



Family Wealth Report AWARDS 2025

MIAMI, LATIN AMERICA & CARIBBEAN

NEWS RELEASE

17 January 2025

WATERMARK PHILANTHROPIC COUNSEL RECOGNIZED

WITH 2025 MIAMI FAMILY WEALTH REPORT AWARD

[Watermark Philanthropic Counsel](#), a leading wealth management industry participant servicing the Miami, Latin America & Caribbean family office and family wealth industry, has been selected as a winner in the 'Consultancy – Caribbean' category at the Miami Family Wealth Report Awards 2025 program.

The annual Miami *Family Wealth Report* Awards program recognizes the most innovative and exceptional firms, teams and individuals serving the family office, family wealth and trusted advisor communities in Miami, Latin America & the Caribbean.

In their selection, the award judges cited:

“Watermark Philanthropic Counsel exemplifies exceptional leadership in philanthropy, blending tailored advisory services, thought leadership, and significant contributions to the family wealth community. Dr. Hale’s dedication to advancing Caribbean philanthropy has been transformative, fostering impactful giving and strengthening regional nonprofits. Through collaboration with UHNW families, groundbreaking research with the publication of [“A portrait of affluent giving in the Caribbean: Experiences, barriers and the future of philanthropy”](#), and teaching and writing for global audiences, Watermark has redefined philanthropy advisory practices, and bridges technical and purpose-driven aspects of giving to empower multigenerational wealth and legacy planning.”

On being recognized with the award, Dr. Sharilyn Hale, Founder & President of Watermark Philanthropic Counsel shared:

“We’re thrilled to have our work recognized by the Family Wealth Report Awards. This award demonstrates philanthropy and social impact are integral to family wealth and legacy planning at a time when success is increasingly being redefined by issues of purpose. We’re inspired every day by the people and families we work with who find purpose in making the world – including the Caribbean - better.

We hope this award puts a spotlight on the philanthropy that is happening in the Caribbean and Latin America but that often goes unseen. We also hope it serves as a catalyst for more people, families, and other advisors to families, to make philanthropy a greater priority and to know specialized help is available. When those who give, give well, it strengthens the region’s social, cultural and environmental infrastructure.”



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Stephen Harris, ClearView Financial Media's CEO, and publisher of *Family Wealth Report*, was first to extend his congratulations to all winners and highly commended companies:

"Every category winner and highly commended firm has been subjected to a rigorous and independent judging process and should be rightly proud of the success they have achieved this year. We have seen a marked increase in entrants and interest in all our global awards programmes and Family Wealth Report is no exception. These awards are beneficial as they give organizations and individuals the opportunity to clarify their strategic thinking, have it independently validated, be recognized internally and externally and to celebrate in style with their peers."

"I offer my congratulations and best wishes for the future to Watermark Philanthropic Counsel, and all winners and highly commended firms - they are worthy recipients who join the elite list of wealth management professionals who have been recognized as Family Wealth Report Award winners".

Winners and highly commended companies were announced and celebrated on 16 January 2025 in Miami.

- ENDS -

1. Watermark Philanthropic Counsel

Watermark Philanthropic Counsel helps generous people and families give well, and channel their wealth and influence for good. Based in Canada while serving clients across North America and the Caribbean, Watermark's work is bespoke, informed by each client's needs and objectives, and our experience working in and with communities across jurisdictions, diverse networks, and deep expertise in ways to achieve results on the issues and for the people they care about. Clients benefit with clarity and confidence in their giving, with purposeful giving strategies, sound governance, and family engaged in the experience.

www.watermarkpc.com

2. About ClearView Financial Media Ltd ("ClearView")

ClearView Financial Media was founded by Chief Executive, Stephen Harris in 2004, to provide high quality 'need to know' information for the discerning private client community. London-based, but with a truly global focus, ClearView publishes the *WealthBriefing* group of newswires, along with research reports and newsletters, while also running a pan-global thought-leadership events and awards programme.