

# YOUNG LEADERS IN FINANCE AWARDS 2018

## Finance Broker of the Year

This award recognises the finance broker that best represents the industry across key factors, including, but not limited to, loan volumes, loan book growth, compliance, submission quality and customer service, as well as business processes, systems, stakeholder engagement and customer relationship abilities.

### Eligibility

This award is open to all finance brokers who have been in this role since 1 July 2015 and based on activities over the 2017 calendar year.

**All entrants must be aged 30 years or younger for the duration of the work being completed between 1 January 2017 and 31 December 2017.**

### Submission criteria and requirements

Please answer the following questions (400 words max per question):

- Highlight how you have structured your business and offering to service the wider financial needs of consumers.
- Demonstrate any market specialisation plus tactics, strategies and success in driving business from that sector.
- Highlight innovation in your business and how that has impacted on business growth.
- Provide case studies or examples that showcase how you cater for the needs of clients and how that influences business success.

### Supporting documentation

Optional: Please include any supporting material in your submission so that the judges can consider it. This material can include references, testimonials, statistics, video, media coverage and financial or business metrics and/or statements and third-party independent data reports to support your submission.

We also encourage entrants to submit an optional short video - up to 30 seconds long - answering the question, **“What does success mean to you?”**

### Company information

Aggregator/brokerage (name and contact details)	
State manager (name and contact details)	
Years in industry	
Loan volumes (calendar year 2017) – excluding mortgages	
Other volumes (calendar year 2017) – i.e. insurance	

**Business metrics**

Item	2016	2017
Volume (\$) of residential mortgages settled (Please input \$ figures to the nearest thousand e.g. \$10,552,000)		
Number of residential mortgages settled		
Volume (\$) commercial mortgages		
Number of commercial mortgages		
Volume (\$) business asset/finance		
Number business/asset finance		
Value (\$) insurance policies		
Number insurance policies		
Value (\$) 'other business'		

SCORE	RESPONSE
<b>Score 1 – 2</b>	<b>Did not</b> meet submission requirements. Provided <b>little to no</b> relevant supporting documents. <b>Did not</b> meet expectations.
<b>Score 3 - 4</b>	<b>Partially</b> highlighted/demonstrated submission requirements. Provided <b>little to no</b> relevant supporting documents. <b>Did not</b> meet my expectations.
<b>Score 5 - 6</b>	Highlighted/demonstrated submission requirements. Provided <b>relevant</b> supporting documents. <b>Met</b> my expectations.
<b>Score 7 – 8</b>	<b>Accurately</b> highlighted/demonstrated submission requirements. Provided <b>clear and relevant</b> supporting documents <b>Met</b> my expectations.
<b>Score 9 – 10</b>	<b>Accurately and concisely</b> highlighted/demonstrated submission requirements Provided <b>clear and relevant</b> supporting documents <b>Exceeded</b> my expectations.