

YOUNG LEADERS IN FINANCE AWARDS 2018

Financial Adviser of the Year

This award recognises the financial planner/advice specialist, considering not only the delivery of best practice financial advice, but also the aptitude and acumen to build a successful, client driven advice business.

Eligibility

This award is open to any practising financial adviser and is based on activities over the 2017 calendar year.

NB: Applicant must appear on ASIC's Financial Advisers Register.

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):

- Please provide your AFSL registration number.
- Highlight how you have structured your business and offering to service the financial advice needs of clients – for example, business resourcing, professional development, knowledge expansion.
- Demonstrate the tactics, strategies and success of generating business from this market segment – including conversion of existing clients, generating repeat and referred business, or other marketing campaigns to win business.
- Provide case studies or examples that showcase how you cater for the financial advice needs of clients and how that influences business success.
- Evidence any financial or business metrics and/or statements with supporting documentation, including audited statements, third-party independent data reports or client/partner endorsements and testimonials.

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?”**

Business metrics

Metric	1.1.2016 - 31.12.2016	1.1.2017 - 31.12.2017
Total number of investment clients serviced		
Total funds under advice (FUA) (\$)		
Net Promoter Score (NPS) (optional)		
Recommended template for those who are looking to obtain an NPS: https://www.surveymonkey.com/mp/net-promoter-score-survey-template/		

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