

# **YOUNG LEADERS IN FINANCE AWARDS 2018**

## **SMSF Adviser of The Year**

This award recognises the most outstanding professional dedicated to the consistent provision of quality, robust SMSF advice. It considers the professional development, expertise and strategies of the adviser in servicing and maintaining their SMSF clients.

### **Eligibility**

This award is open to all financial planners and/or accountants who were licensed and operating under a full AFSL and is based on activities in 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):

- Please provide your registered AFSL number.
- Detail your approach to your role as a SMSF adviser and how it influences your actions and activities in your organisation/business.
- What has been your biggest success in SMSF advice?
- How have you ensured that you are across the latest round of legislative and regulatory changes for your SMSF clients?
- Describe how you ensure your SMSF-related education is kept up to date.
- How have you ensured recurring SMSF clients for your practice?

### **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?”**

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