**Application form**

**Entry Criteria:**

Applicants must clearly explain and provide evidence of how their firm has contributed to the financial planning profession over the last 12 months. The application should include specific examples of excellence, detailing the positive impact of each initiative.

Your application should focus on the following areas:

**A. Contribution to the Financial Planning Profession**

Applicants should highlight their firm’s efforts to advance the profession, such as:

* **Attracting and Inspiring the Next Generation:** How does your firm engage with and encourage the next generation of financial planners to ensure the profession’s future growth?
* **Financial Planning Week Participation & Initiatives:** What role did your firm play in Financial Planning Week, and what initiatives did you undertake?
* **Giving Back to Other Firms and Professionals:** Describe how your firm has supported or collaborated with other firms or professionals.

**B. Building Best Practices within Your Firm**

Explain the actions your firm has taken to foster a culture of excellence and best practices:

* **Enhancing the Client Experience:** What new initiatives or improvements has your firm introduced to elevate client service?
* **Mitigating Cybersecurity Risks:** Describe the steps your firm has taken to minimize the risk of a cyber-attack and protect client data.
* **Firm Culture and Community:** How would you describe your firm’s culture? How does it contribute to positive work environment?

**C. Service Excellence and Its Measurement**

Applicants should provide examples of how their firm ensures excellence in service delivery:

* **Training & Certification:** How does your firm invest in the training and professional development of its team? Specifically, how is the Certified Financial Planner (CFP) designation incorporated into your firm’s processes?
* **Client-Centered Financial Planning:** How do you ensure that cash flow and financial planning remain central to the client experience?

**D. Promotion of Consumer Awareness of Financial Planning**

Describe how your firm works to raise awareness and educate consumers about financial planning:

* **Clear Communication of Your Proposition:** How do you communicate your financial planning services and value proposition to clients?
* **Website & Communications:** How does your firm use its website, social media, and other communications (e.g., podcasts, books, articles) to promote financial planning awareness?
* **Client Retention & New Client Acquisition:** How do you maintain strong relationships with existing clients and attract new ones?

**Additional Details:**

* **Word Limit:** Your application must not exceed 2,500 words.
* **Attachments:** You may include up to three attachments that were produced within the last 12 months. These could be reports, case studies, or any relevant documents that support your application.

**Your Entry**

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| Name of firm |  |
| Name of person completing this form |  |
| Your position in firm |  |
| Contact email |  |
| Contact telephone number |  |
| Website address |  |
| Word count |  |

Section A: Your contribution to the financial planning profession.

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Section B: Building best practice in your firm

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Section C: Service excellence and how it is measured by your firm

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Section D: Promotion of consumer awareness of financial planning

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