

ADVISER INNOVATION EXCELLENCE AWARD

AWARD SUMMARY

Recognises a financial adviser who has demonstrated outstanding innovation in the development or delivery of financial advice, enhancing both client value and practice growth.

ELIGIBILITY

Open to licensed financial advisers practising in Australia during the 2024 calendar year. Candidates can self-nominate or be nominated.

ASSESSMENT CRITERIA

- **Advisory Innovation:** Detail the innovation, model, or methodology introduced in the advice process.
- **Client Outcomes:** Provide evidence that the innovation has enhanced client understanding, engagement, or financial outcomes.
- **Practice Development:** Demonstrate how the innovation has contributed to the efficiency, compliance, or scalability of your practice.
- **Industry Engagement:** Describe how you are influencing peers or the industry through your innovative approach.

BUSINESS METRICS

1/1/2023 – 31/12/2023

1/1/2024 – 31/12/2024, including:

- Increase in client satisfaction or retention following innovation
- Growth in advice-related revenue
- Number of clients benefiting from the innovation