

CLIENT SERVICING AWARD

AWARD SUMMARY

Recognises a financial professional who excels in delivering exceptional client service through a highly personalised and proactive approach, significantly enhancing client satisfaction and loyalty.

ELIGIBILITY

Open to financial professionals actively practising in Australia during the 2024 calendar year who have direct client interactions. Candidates can self-nominate or be nominated.

ASSESSMENT CRITERIA

- **Service Excellence:** Detail your approach to providing outstanding client service and client management.
- **Personalisation of Service:** Provide examples demonstrating how personalised strategies or solutions have effectively addressed client-specific needs.
- **Innovative Client Solutions:** Highlight innovative approaches or solutions introduced to enhance client experience and outcomes.
- **Client Retention and Loyalty:** Showcase evidence of client retention, loyalty, and satisfaction through testimonials and measurable outcomes.

BUSINESS METRICS

1/1/2023 – 31/12/2023

1/1/2024 – 31/12/2024, including:

- Client retention rates
- Number of clients serviced
- Client satisfaction metrics and testimonials