

# FINANCIAL SERVICES PRACTICE PRINCIPAL OF THE YEAR

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## AWARD SUMMARY

This award recognises an outstanding Practice Principal who has demonstrated exceptional leadership, vision, and commitment to their business and the financial advice profession. This individual has excelled in driving growth, fostering innovation, and maintaining the highest standards of ethical practice. The award acknowledges those who have significantly contributed to the success and development of their business, and the financial advice industry as a whole.

## ELIGIBILITY

This award is open to all financial services Practice Principals who led a practice in Australia during the 2024 calendar year. Candidates can self-nominate or be nominated by others.

## ASSESSMENT CRITERIA

Submissions will be evaluated based on responses to the following criteria, with a maximum of 300 words per criteria:

- **Leadership and Vision:** Describe how you have demonstrated exceptional leadership and vision in managing your practice. Highlight specific initiatives or strategies that showcase your leadership qualities.
- **Driving Growth:** Detail how you have structured your practice to drive sustainable revenue growth. Include examples of successful strategies and their outcomes.
- **Innovation:** Explain how you have fostered innovation within your practice. Provide examples of innovative practices or solutions that have been implemented and their impact on business growth.
- **Ethical Practice:** Illustrate how you have maintained the highest standards of ethical practice. Provide specific examples where applicable.

## SUPPORTING DOCUMENTS

Please provide the following supporting documents:

Metrics for the following periods: 1/1/2023 – 31/12/2023 and 1/1/2024 – 31/12/2024, including:

- Total business revenue
- Total revenue under principal's control
- Client growth percentages of principal's clients
- Principal's client retention rates
- Total number of staff under principal's direction

Candidates are encouraged to provide specific examples, metrics, and supporting documentation where applicable such as testimonials or endorsements from colleagues, clients, or industry peers.