

FINANCIAL SERVICES PRACTICE OF THE YEAR

11 or more Employees

AWARD SUMMARY

This award honours a professional practice that has demonstrated exceptional performance across all facets of their operation. The winning business will have excelled in client service, innovation, professional development, and ethical practice, setting a benchmark for excellence in the financial advice industry. Recognising a superannuation related or financial advice practice that has demonstrated excellence:

- Evidence of client satisfaction and growth.
- Innovative practices and services.
- Community engagement and industry contribution.
- Candidates can self-nominate or be nominated.

ELIGIBILITY

This award is open to financial practices operating 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:

- **Client Satisfaction and Growth:** Provide evidence of client satisfaction and growth, including testimonials, client feedback, and metrics demonstrating increased client base or retention rates.
- **Innovative Practices and Services:** Detail the innovative practices and services your business has implemented. Highlight specific examples that showcase how these innovations have benefited clients and improved business performance.
- **Community Engagement and Industry Contribution:** Describe your business's engagement with the community and contributions to the financial advice industry. Include involvement in community projects, industry associations, or initiatives that support the profession.
- **Professional Development and Ethical Practice:** Illustrate how your business promotes professional development and maintains high ethical standards. Provide examples of training programs, ethical guidelines, and how these have been integrated into your practice.

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 revenue
- Client growth percentages
- Client retention rates

Candidates are encouraged to provide specific examples, metrics, and supporting documentation where applicable including testimonials or endorsements from clients, industry peers, or community organisations.