

# HOLISTIC ADVICE BUSINESS OF THE YEAR

## AWARD SUMMARY

This award recognises a business that provides comprehensive and integrated financial advice, considering all aspects of a client's financial well-being. The Holistic Advice Business of the Year excels in delivering personalised, client-focused advice that encompasses financial planning, investment management, tax, risk management, and estate planning. This accolade honours a practice that sets the benchmark for holistic financial advice, ensuring the overall financial health and prosperity of their clients.

## ELIGIBILITY

This award is open to all financial advice practice operating in Australia during the 2024 calendar year that provides holistic and integrated financial services. 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:

- **Comprehensive Financial Planning:** Describe how your business delivers comprehensive financial planning. Include examples of how you assess and address all aspects of a client's financial needs and goals.
- **Integrated Advice Services:** Detail how your business integrates various financial services, such as investment management, risk management, and estate planning, to provide a cohesive and holistic approach. Provide specific examples or case studies.
- **Client-Focused Advice:** Illustrate your business's commitment to delivering personalised, client-focused advice. Highlight strategies used to understand and prioritise client needs, preferences, and goals.
- **Financial Well-Being:** Demonstrate how your advice contributes to the overall financial well-being of your clients. Include metrics, client testimonials, and feedback that reflect the positive impact of your services.
- **Innovation in Holistic Advice:** Showcase any innovative practices or tools your business has developed to enhance holistic financial advice. Provide examples of how these innovations have improved client outcomes and business performance.

## 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.