

SMSF ADVISER OF THE YEAR

AWARD SUMMARY

Honours an SMSF adviser who excels in delivering insightful, personalised advice tailored to the needs of clients with SMSFs.

ELIGIBILITY

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

ASSESSMENT CRITERIA

- **Expertise and Service Excellence:** Detail your approach to advising SMSF clients, demonstrating personalised and strategic planning.
- **Regulatory Compliance:** Evidence of compliance with superannuation legislation, regulations and ethical standards.
- **Client Outcomes:** Showcase client success stories, measurable growth, or testimonials highlighting your impact.
- **Innovation in Advice:** Highlight any innovative strategies or tools employed to enhance client outcomes.

BUSINESS METRICS

1/1/2023 – 31/12/2023

1/1/2024 – 31/12/2024, including:

- Number of SMSF clients serviced
- Client growth percentages
- Client retention rates

