

SMSF PRACTICE OF THE YEAR

AWARD SUMMARY

Celebrates an SMSF practice demonstrating excellence in all operational facets including client satisfaction, innovation, professional development, and ethical standards.

ELIGIBILITY

Open to SMSF practices operating in Australia during the 2024 calendar year. Practices can self-nominate or be nominated.

ASSESSMENT CRITERIA

- **Client Satisfaction and Growth:** Evidence client satisfaction through testimonials and retention/growth metrics.
- **Innovative Client Services:** Describe innovative services or strategies implemented.
- **Ethical and Professional Standards:** Outline the practice's commitment to high ethical standards and professional development initiatives.
- **Community and Industry Contribution:** Provide details of active industry engagement and community contributions.

BUSINESS METRICS

1/1/2023 – 31/12/2023

1/1/2024 – 31/12/2024, including:

- Total practice revenue
- Client growth percentages
- Client retention rates

