AUSTRALIAN FINANCIAL INDUSTRY AWARDS 2026

Proudly presented by INSTITUTE OF FINANCIAL PROFESSIONALS AUSTRALIA

CATEGORIES & ELIGIBILITY

1 OCTOBER 2026, THURSDAY | FULLARTON HOTEL, SYDNEY

The 2026 Australian Financial Industry Awards – Celebrating excellence in the accounting, superannuation, and financial advice sector

WHAT THE AWARDS ARE:

An Australian Financial Industry Award is a distinguished accolade conferred by the Institute of Financial Professional Australia (IFPA). These prestigious awards seek to recognise and honour outstanding professionals who have demonstrated unparalleled expertise, dedication, and innovation in the field of financial services within Australia. The criteria for qualifying for this award are as follows:

- **Membership:** The nominee does not have to be a current and active member of the Institute of Financial Professional Australia.
- **Ethics and Professionalism:** Adherence to the highest standards of ethics practice and professional conduct, as endorsed by the Institute of Financial Professionals Australia.
- **Contribution to the Industry:** Engaging in activities that promote the growth and development of the profession within Australia, including participation in seminars, workshops, and publications.
- **Client Satisfaction:** A proven track record of client satisfaction, reflecting the candidate's commitment to delivering exceptional service.
- **Nomination:** Candidates can be self-nominated by a peer, client, or supervisor, and the nomination must be supported by detailed documentation that demonstrates the nominee's eligibility based on the above criteria. Parties may enter more than one category.
- **Judging Panel:** The selection will be carried out by a panel of esteemed professionals appointed by the Institute of Financial Professional Australia. The panel's decision will be based on a comprehensive evaluation of the nominee's accomplishments, skills, and contributions to the respective fields.

Winning an Australian Financial Industry Award is a distinguished honour that not only acknowledges professional mastery but also celebrates an individual's dedication to elevating the standards of the financial industry in Australia.

ACCOUNTING PRACTICE OF THE YEAR

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 industry.

The winning practice will have demonstrated:

- A commitment to professional development.
- Staff development.
- Ethical standards.

ELIGIBILITY

This award is open to all financial practices operating in Australia during the 2025/2026 calendar year Candidates can self-nominate or be nominated by others. Open to practices whose core service offering is accounting, tax, bookkeeping, audit, or business advisory services. Revenue threshold: At least 50% of the practice's revenue must be derived from accounting, tax, or compliance related services.

ASSESSMENT CRITERIA

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

- **Commitment to Professional Development**: Detail your business's commitment to professional development. Include examples of training programs, certifications, and continuous education initiatives that your staff have undertaken.
- **Client Satisfaction**: Provide evidence of client satisfaction and growth. Include client testimonials, feedback, and metrics demonstrating increased client base or retention rates.
- **Staff Development:** Explain how your business promotes staff development. Highlight initiatives aimed at enhancing skills, career progression opportunities, and staff engagement activities.
- **Innovative Practices**: Describe the innovative practices and services your business has implemented. Highlight specific examples that showcase how these innovations have benefited clients and improved business performance.
- **Ethical Standards**: Illustrate how your business upholds high ethical standards in its operations. Provide examples of ethical guidelines, compliance measures, and how these are integrated into your practice.

SUPPORTING DOCUMENTS

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

Submit a Nomination or Nominate Yourself!

AUSTRALIAN FINANCIAL PROFESSIONAL OF THE YEAR

RECOGNISING THE PINNACLE OF INDIVIDUAL EXCELLENCE

The *Australian Financial Professional of the Year* is the highest individual honour within the Australian Financial Industry Awards. This distinguished accolade is awarded to an individual representing the best of the profession.

This award celebrates a financial professional who has not only excelled in their area of practice but has demonstrated a commitment to the broader profession through outstanding leadership, client advocacy, and continuous professional development. The recipient will have gone above and beyond their core duties, embodying integrity, innovation, and service excellence.

Whether in accounting, advice, superannuation, or audit, the winner of this award is regarded as a trailblazer - someone whose contribution has advanced the standing of their profession and had a tangible impact on clients, peers, and the broader community. They represent the future of the sector while honouring its highest values.

ELIGIBILITY

This award is open to financial services practices operating in Australia during the 2025/2026 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 that you implemented. Highlight specific examples that showcase how you improved business performance. How has it benefited clients.
- **Community Engagement and Industry Contribution**: Describe your business 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.

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FINANCIAL SERVICES PRACTICE OF THE YEAR

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 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 services practices operating in Australia during the 2025/2026 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: Open to practices whose core service offering is financial planning, wealth management, or financial advice (this category excludes practices whose primary offering is SMSF administration or advice — see SMSF Practice of the Year below).

Revenue threshold: At least 50% of the practice's revenue must be derived from financial advice or superannuation-related advisory services.

- **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:

- Total revenue
- Client growth percentages
- Client retention rates

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

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INSTITUTE OF FINANCIAL PROFESSIONALS AUSTRALIA (IFPA) MEMBER OF THE YEAR

AWARD SUMMARY

This prestigious award is given to an Institute of Financial Professionals Australia (IFPA) member who has made significant contributions to the association and the broader financial advice profession. The IFPA Member of the Year will have demonstrated leadership, commitment, and active involvement in promoting the values and objectives of the Institute of Financial Professionals Australia. Acknowledging an IFPA member who has demonstrated outstanding commitment:

- **Significant contribution to IFPA and the wider financial community.**
- **Engagement in IFPA activities and initiatives.**
- **Upholding the values and standards of IFPA.**
- **Candidates can self-nominate or be nominated.**

PURPOSE OF THE AWARD

The purpose of this award is to recognise the service of an individual to our association. It is given for significant contributions to the membership, participation in, and support of its meetings and recruitment, or other significant activities. This award acknowledges an IFPA member who has demonstrated outstanding commitment and service to the association and the wider financial community.

ELIGIBILITY

Any current IFPA member is eligible to receive this award. Nominee activities considered for this award include participation in discussion groups, meetings, programs, special projects, recruitment of new members, and provision of other services to members.

ASSESSMENT CRITERIA

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

- **Significant Contribution**: Describe your significant contributions to IFPA and the wider financial community. Highlight specific initiatives or actions that have had a substantial impact.
- **Engagement in IFPA Activities**: Detail your engagement in IFPA activities and initiatives. Include your roles in discussion groups, meetings, programs (as organiser, moderator, speaker, discussant, etc.) and participation in special projects.
- **Upholding IFPA Values**: Illustrate how you have upheld the values and standards of IFPA in your professional conduct and community interactions.
- **Membership Recruitment**: Explain your efforts in recruiting new members to IFPA, detailing specific strategies or activities that have been successful.
- **Service Provision**: Highlight your participation in the provision of services to IFPA members. Provide examples of how your contributions have benefited the association and its members.

Candidates are encouraged to provide specific examples, metrics, and supporting documentation where applicable.

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SMSF PRACTICE OF THE YEAR

AWARD SUMMARY

This award recognises a practice that has demonstrated exceptional performance in the specialised field of self-managed superannuation funds. SMSF work demands a distinct level of technical expertise, regulatory knowledge,and compliance rigour that sets it apart from broader financial advice, spanning fund establishment, administration, audit and ongoing trustee support. The winning practice will have set a benchmark for excellence in SMSF service delivery, client outcomes, and ethical and professional standards.

The winning practice will have demonstrated:

- Deep technical expertise in SMSF establishment, administration, and compliance.
- A strong commitment to trustee education and client support.
- Ethical standards and rigorous adherence to superannuation regulation.

ELIGIBILITY

This award is open to all SMSF practices operating in Australia during the 2025/2026 calendar year. Practices can self-nominate or be nominated by others. Open to practices whose core service offering is SMSF establishment, administration, audit, or advice.

Revenue threshold: At least 50% of the practice's revenue must be derived from SMSF-related services, or the practice administers a minimum of 50 SMSFs.

ASSESSMENT CRITERIA

Open to practices whose core service offering is SMSF establishment, administration, audit, or advice. Revenue threshold: At least 50% of the practice's revenue must be derived from SMSF related services, or the practice administers a minimum of 50 SMSFs. Submissions will be evaluated based on responses to the following criteria, with a maximum of 300 words.

- **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

Please provide the following business metrics:

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

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

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IFPA BOARD RECOGNITION OF SERVICES IN AUSTRALIA

AWARD SUMMARY

This award recognises an individual or practice who has made an outstanding and sustained contribution to the Australian financial sector. It honours leadership, professional integrity, advocacy, innovation, and service that have positively influenced the profession, through

- Sustained and meaningful service to the Australian financial sector.
- Leadership, integrity, and commitment to professional standards.
- Positive influence on professionals, businesses, consumers, or the broader community.
- Advocacy for education, better industry practice, innovation, inclusion, or professional development.

PURPOSE OF THE AWARD

The purpose of this award is to acknowledge an individual or practice whose contribution has had a lasting impact on the Australian financial sector. It recognises service that strengthens the profession, promotes high standards, and supports the ongoing development and reputation of the sector.

ELIGIBILITY

Nominees may be financial services professionals, educators, advocates, leaders, or other individuals who have demonstrated significant service to and impact within the Australian financial sector. Nominees do not need to be current IFPA members.

ASSESSMENT CRITERIA

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

- **Leadership and Integrity**: Explain how the nominee has demonstrated leadership, integrity, and commitment to professional standards.
- **Industry Impact**: Provide evidence of the nominee's positive influence on financial professionals, consumers, businesses, or the broader community.
- **Advocacy and Advancement**: Detail how the nominee has supported education, innovation, better industry practice, inclusion, or professional development across the sector.
- **Legacy of Service**: Illustrate the nominees enduring impact or legacy of service within the profession or sector.

Candidates are encouraged to provide specific examples, endorsements, and supporting documentation where applicable.

AWARD DETERMINATION

The recipient will be selected by the IFPA Board. This award may be presented at the Boards discretion and is not necessarily awarded every year.

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