

THE
FINANCIAL
PLANNER
OF THE
YEAR
AWARD



2002 Entry Form

Organised by

Good! = Returns

YOUR COMPLETE ONLINE MONEY MANAGEMENT MAGAZINE

Sponsored by



Prizes sponsored by Microsoft and Morningstar

Stand Up and Be Recognised!

- Are you a professional Financial Planner who is serious about your career?
- Want to enjoy nationwide recognition of your professional expertise? And win over \$7000 worth of prizes?

If the answer is YES, then enter the 2002 Financial Planner of the Year Awards.

Now in their third year, the Awards have been developed to promote financial planning to the public and to recognise and honour excellence and professionalism in financial planning.

So, if you think your practice is outstanding, your advice sound and your integrity unchallenged, now is your opportunity to stand up and be recognised.

Prizes

The Winner will receive nationwide publicity and over \$7000 worth of prizes! Including:

- Up to \$2500 to attend a conference of your choice
- One year subscription to Morningstar's Adviser Workstation
- Microsoft Office XP

Each finalist will win games supplied by Microsoft and a Palm personal organiser.

Entry Requirements

You will be judged on your skill and professionalism. The judging panel will be looking for potential winners who have contributed to their industry and the community.

You will be judged on:

- Competency
- Professionalism
- Communication skills
- Knowledge of current issues
- Input to the profession
- Marketing ability
- Career achievements
- Extracurricular contributions to the community

To enter you must submit a Case for the Award, up to 600 words, which demonstrates how you have met the above criteria. The Case for the Award should detail your approach to client service, a list of courses attended and demonstrate how successful your business has been.

You must provide the judges with a financial plan you have written for a client and outline how it has met that client's needs. Also, that client must provide a written testimonial supporting the financial planner and the plan.

Good! = Returns

YOUR COMPLETE ONLINE MONEY MANAGEMENT MAGAZINE

Good Returns (www.goodreturns.co.nz) is your one stop shop for personal finance news and information. The site, which is FREE to visit, provides news, information and data on:

- Managed Funds
- Mortgages
- Superannuation
- Insurance
- Financial Planning
- Trusts and Estate Planning

Visit the site regularly to get daily news and data.

Besides being a valuable source of news and information, *Good Returns* provides a growing number of services including:

DIARY SERVICE: FREE listing of all upcoming events, roadshows and conferences in the financial services industry.

PEOPLE PAGE: Keep track of new appointments on this popular page

DAILY MORTGAGE RATES NEWSLETTER: Subscribe to this service and get all the latest mortgage rates and news delivered to your desk first thing every morning. For a FREE trial send your name and email address to rates@goodreturns.co.nz.

BOOKSTORE: You can buy a wide range of books on personal finance, investing and financial planning from our online Bookstore – as well as some of the latest office gadgets. We also offer discounted prices on text books required for Massey Universities financial planning papers.

FIND-A-PLANNER SERVICE: Promote your business through our Find-A-Planner service. This listing is designed to help the public find a suitable adviser to help them manage their money. Besides having your name and number listed on this page you can have direct links to both your email address and website. Also, there is space to tell people why they should come to you (maximum 200 words).

JOBLINE: The place to find jobs in the financial services industry in New Zealand.



Good Returns, PO Box 2011, Rotorua

Phone 07 345 6869 Fax 07 345 3436 Mob: 027 4377 527

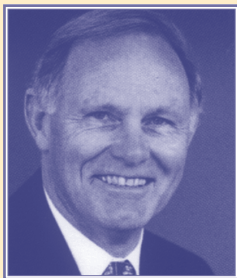
Email: info@goodreturns.co.nz

www.goodreturns.co.nz

The Judges



Rod Carr
Deputy Governor,
Reserve Bank



Colin Blair
Retirement Commissioner



Mary Holm
Business Journalist

Previous Winners

1999 Winner



"Winning the inaugural *Financial Planner of the Year Award* has enhanced the profile of professional financial planning and my practice"

◀ **Rodger Spiller**

2001 Winner



Jordi Garcia ▶

How to Enter

Fill out the attached entry form and post it to:

Financial Planner of the Year Awards

PO Box 2011

ROTORUA 3215

Entrants must include:

- A curriculum vitae
- Case for the Award: Entrants should supply a written explanation (max 600 words) explaining why they should be judged the Financial Planner of the Year
- A financial plan they have written for a client, which shows how it has met that person's needs
- A testimonial from the client

Nominations must be received no later than **October 25, 2002.**

Entrants will be shortlisted by senior staff from the Department of Finance, Banking and Property at Massey University.

Shortlisted nominees will be interviewed by the judges on November 13, 2002.

Finalists and the Winner will be announced at the Awards Gala Dinner on November 13 at the Sheraton Hotel, Auckland.

PRIVACY POLICY: The judging criteria for the Awards require that specific personal and financial details are made available to the judges. This information will only be used for judging and will not be made public, without written consent from the people who supplied that information. Please clearly indicate to the judges any information that must be kept confidential.

CONDITIONS OF ENTRY

1. The Awards are open to any Financial Planner operating in New Zealand
2. Previous finalists may enter, however previous winners are ineligible for three years
3. Entrants may nominate themselves
4. Candidates must be available for an interview with the judges in Auckland on the day of the function, 9 October 2002, and for the presentation itself.
5. The Judges decision is final. No correspondence may be entered into once the judges decision has been made.

ENTRY FORM

2002 FINANCIAL PLANNER OF THE YEAR AWARDS

Title (Mr/ Mrs/ Ms/ Miss) _____

Full Name _____

Name of Business _____

Address _____

Phone _____

Fax _____

Email _____

Years in Financial Planning Industry: _____

Client Contact _____

Full Name _____

Address _____

Phone (Home) _____

Phone(Business) _____

CHECKLIST: Have you attached the following?

☐

CV

☐

Case for Award

☐

Financial Plan

☐

Client testimonial

AGREEMENT

By entering the awards I agree to allow the judges to contact my client on a confidential basis to discuss the work I have done for them.

Signed _____

Date _____

Fill out the attached entry form and post it to:
Financial Planner of the Year Awards, PO Box 2011, ROTORUA 3215

2002 FINANCIAL PLANNER OF THE YEAR AWARDS
SPONSORS



Prizes sponsored by

Microsoft®

MORNINGSTAR