



Please complete all of the following:

YOUR DETAILS

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 x 4
- Case for Award x 4
- Financial Plan x 4
- Client testimonial x 4

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 _____

Entry requirements:

Completed entries, copies and original material should be posted to:

Financial Planner of the Year Awards
PO Box 2011 **OR:** 104a Tarawera Road, Rotorua
ROTORUA 3215

You must include 4 COPIES of:

- A curriculum vitae
- Case for the Award: You should supply a written explanation (max 600 words) explaining why you should be judged the Financial Planner of the Year - refer to the criteria for the Award
- A current financial plan you have written for a client (you may have presented the initial plan some years ago). You must show how it has met that person's needs over time.
- A testimonial from the client

DEADLINE: Entries must be received no later than Friday September 16, 2005

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 before the function, 2 November 2005, and for the presentation itself on 3 November 2005.
5. The Judges decision is final. No correspondence may be entered into once the judges decision has been made.

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.