



# Insurance Adviser of the Year Award

## OFFICIAL 2007 ENTRY FORM

**Please complete all of the following**

Title (Mr/Mrs/Ms/Miss)

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Full Name

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Company

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Position/Title

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Email

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Address

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Phone (daytime)

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Phone (evening)

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Fax

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## CHECKLIST

**Have you attached the following?**

- Covering letter
- Career achievements list and CV
- Client endorsements x 3
- Answers to the 5 questions



# Insurance Adviser of the Year Award

The Awards are being run by *ASSET Magazine* and the Professional Advisers Association (PAA).

The aim of the Awards is to identify and celebrate best practice in the risk advisory profession. The Awards will raise the public profile of the good work advisers do for their clients and will identify advisers who run their business on a best practice basis and are role models to others in the profession.

## Judging Process

The awards are open to any New Zealand-based advisers specialising in life insurance.

Applicants should provide the following information:

- A covering letter outlining why they should be considered for the awards (600 words).
- Information covering the individual's Career achievements.
- A CV.
- Applicants should also provide three separate written client endorsements, references or testimonials detailing how the adviser has met the needs of those clients.

Applicants will be judged on a number of criteria.

- Applicants needs to answer each of these questions in writing. Answers to each question should be around 400 words and, where noted, include supporting material.

### Quality of business written

The judges will be looking for your persistency figures. As part of the Awards process you will need to provide the names of up to three of your main carriers. Also included in this category are the client references/testimonials.

### Professional Development

Please provide details of your relevant industry training and also you will be required to demonstrate on-going professional development.

### Industry Best Practice

The judges will be looking to see that you do a full needs analysis when working with a client and some examples of a typical client report.

Tell the judges about your client service standards and procedures and record keeping procedures.

### Business Management

How well do you run your business? Do you have a marketing plan and a business plan and what do you do in terms of financial management. How does your business operate when you are away?

### Input into the community

Demonstrate how you put something back into the industry and your local community. For instance you may have served on a local industry association or mentored younger advisers. Maybe you are involved in community activities such as Rotary or Lions or served on a school Board of Trustees.

Applicants who are short-listed for the Awards will be required to take part in a face-to-face interview with the judging panel.

### Please send your entry to

Insurance Adviser of the Year Awards  
Tarawera Publishing  
PO Box 2011  
ROTORUA  
Or courier them to:  
61-63 Marguerita Street  
ROTORUA

For further information contact  
Philip Macalister (07) 349 1920 or email  
awards@assetmagazine.co.nz

Further details can be found online at [www.tarawera.co.nz/awards.html](http://www.tarawera.co.nz/awards.html)

This site will have details of the judges and prizes, full conditions, plus a set of questions and answers about the Awards.

**Entries close on February 15, 2008**



In association with

NEW ZEALAND  
**ASSET**

**PAA**  
Professional Advisers Association (NZ) Inc