

THE  
FINANCIAL  
PLANNER  
OF THE  
YEAR  
AWARD



2001

Entry Form

Organised by

**Good! Returns**

YOUR COMPLETE ONLINE MONEY MANAGEMENT MAGAZINE

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# Introduction

If you're a professional Financial Planner who is serious about your career then you should consider entering the 2001 Financial Planner of the Year Awards. The Awards have been developed to promote financial planning to the public and encouraging practising Financial Planners to aspire towards excellence.

So if you are proud of your achievements and would like to be recognised for your skills and professionalism you should enter these Awards.

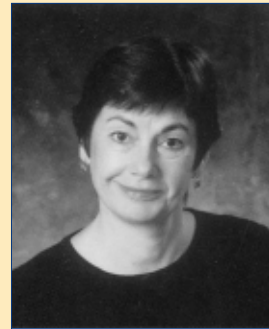
## Judges



Rod Carr - Reserve Bank of New Zealand Deputy governor.



Colin Blair - Retirement Commissioner



Mary Holm - Journalist

## 1999 Winner



**Dr. Rodger Spiller**

“Winning the inaugural Financial Planner of the Year Award has enhanced the profile of professional financial planning and my practice.”  
– Rodger Spiller.

### How to enter

To enter the Awards fill out the attached entry form and post it to:

**Financial Planner of the Year Awards  
PO Box 2011  
ROTORUA 3215**

Entrants must include the following with their entry forms:

- \* A Curriculum Vitae
- \* Case for the Award: Entrants should supply a written explanation (max 600 words) showing 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 that client.

Nominations must be received no later than Wednesday September 5, 2001.

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 won't be made public, without written consent from the people who supplied that information. Please clearly indicate to the judges any material that must be kept confidential.

# Good Returns Profile & Products

## Good Returns - Your COMPLETE online money management magazine

Good Returns ([www.goodreturns.co.nz](http://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 as the news and data is updated daily

Good Returns also has a Diary service listing all the upcoming roadshows and conferences in the financial services industry, plus the popular People page which keeps track of new appointments.

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

### Daily Mortgage Rate Newsletter:

Subscribe to this service and get all the latest mortgage rates and news delivered to you desk first thing each morning.

For a FREE trial send your name and email address to [rates@goodreturns.co.nz](mailto:rates@goodreturns.co.nz)

### Personal Finance Books:

You can buy a wide range of books on personal finance, investing and financial planning from Good Returns' online bookstore.

### Find-A-Planner Service:

Good Returns can help you grow your business with its Find-A-Planner service. This listing service 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).

Contact Good Returns for more details on how to list your business on this page.

### Jobline:

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



2001

Good Returns  
PO Box 2011  
Rotorua

Phone: 07-3456869 Fax: 07-3453436 Mob: 025-377527  
Email: [info@goodreturns.co.nz](mailto:info@goodreturns.co.nz) Web: [www.goodreturns.co.nz](http://www.goodreturns.co.nz)

# Financial Planner of the Year Entry Requirements

Financial Planners who enter the awards will be judged on their skills and professionalism. The judging panel will be looking for professional Financial Planners who have contributed to their industry and the community.

Entrants will be judged on their:

- \* competency
- \* professionalism
- \* communications skills
- \* knowledge of current issues
- \* input to the profession
- \* marketing ability
- \* career achievements
- \* extracurricular contributions made to the community

Entrants will be asked to submit a Case for the Award, up to 600 words, which demonstrates how they have met the above criteria. The Case for the Award should detail their approach to client service, their independence, a list of courses attended and demonstrate how successful their business has been.

They must also provide the judges with a financial plan they have written for a client, and outline how it has met that client's need. Also, that client must provide a written testimonial supporting the financial planner and the plan.

## Conditions of Entry

1. The Awards are open to any Financial Planner operating in New Zealand
2. Previous finalists may enter the Awards, 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 and for the presentation function itself.
5. The Judges' decision is final. No correspondence will be entered into once the judges' decision has been made.

The principal sponsors of the Awards are:

Armstrong Jones

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Perpetual Investments

TOWER Managed Funds

## Prizes

The winner will receive up to \$2,500 to attend a conference of their choice, plus a one year subscription to Morningstar's Total Access Package and Strategy Handbook valued at \$7,500. Each finalist will win a Palm m100 personal organiser.

More details on the Awards, including Guidelines for Entering, can be found on the Good Returns website [www.goodreturns.co.nz/](http://www.goodreturns.co.nz/)



# Entry Form

## ENTRY FORM

Personal details \_\_\_\_\_

Name: (Mr/ Ms/ Mrs/ Miss) \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Business details \_\_\_\_\_

Name of firm \_\_\_\_\_

Years in Financial Planning industry: \_\_\_\_\_

Professional Associations: \_\_\_\_\_

Client contact \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone (business) \_\_\_\_\_

Phone (Home) \_\_\_\_\_

## 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 \_\_\_\_\_

# Sponsors



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