THE DISTINGUISHED ADVISOR CONFERENCE (DAC) CLIENT INNOVATION SCHOLARSHIP AWARD APPLICATION

Please complete and return a copy via email to Barbara@knowledgebureau.com by May 30, 2017

Name	
Firm	
Address	
City/Province/Postal Code	
Email	
Phone with area code	
Website	
Years in Business	

BRIEF INTRODUCTION OF WHO YOU ARE:

CAREER HIGHLIGHTS:

NOTEWORTHY AWARDS, RECOGNITION, SPEAKING ENGAGEMENTS, BROADCASTING

WORK-LIFE ACTIVITIES:

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THE DAC CLIENT INNOVATION SCHOLARSHIP AWARD CRITERIA

In answering each question below, please think about the following questions the judges will be considering as they read your answers :

- How have you maximized your potential for delivering innovative solutions to your clients?
- Why should your practice be selected as the recipient of the DAC CLIENT INNOVATION SCHOLARSHIP AWARD?
- What advice would you share with other Advisors at the conference with regard to your success?

1. DIFFERENTIATED VALUE PROPOSITION: how it is articulated, executed and received.

2. NEW APPLICATION OF KNOWLEDGE AND SKILLS: how continuous improvement has changed the way you manage family wealth with multiple generations.

3. CLIENT RETENTION AND SATISFACTION: demonstrable strategies to retain assets and enhance your client's experience and thereby satisfaction with your offering.

4. REFERRABILITY: your well-articulated program to grow business through referrals

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5. PROFESSIONAL COLLABORATION: partnership with other circles of influence to enhance value to your client.

6. OUT OF THE BOX THINKING: new ways to communicate and connect with your clients & prospects.

By submitting your signature and application, you acknowledge that your picture and bio information may be used in the promotion of the Distinguished Advisor Conference and **the DAC CLIENT INNOVATION SCHOLARSHIP AWARD**.

Signature	Date

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