



DOUG NELSON WINS 2017 DISTINGUISHED ADVISOR CONFERENCE (DAC)

CLIENT INNOVATION SCHOLARSHIP AWARD

Canadian portfolio manager and 25 year veteran of the financial services industry, Douglas V. Nelson, CFP, MFA, CLU, CIM has been awarded the **2017 DAC Client Innovation Scholarship Award** to be awarded at the Distinguished Advisor Conference, held in Kelowna, BC, November 5-8th. The award was co-founded by [Knowledge Bureau](#) and [Franklin Templeton Investments in 2016](#).

"At Franklin Templeton we believe in the value of advice and are proud to sponsor an award that recognizes achievements of advisors who are excelling in client engagement and innovation. Our sincere congratulations go out to Doug Nelson for the 2017 award," said Duane Green, President & CEO at Franklin Templeton Investments Canada.

Mr. Nelson is the President of Nelson Financial Consultants, an independent financial advisory firm based in Winnipeg. He is also the author of *Master Your Retirement, How to Fulfill Your Dreams with Peace of Mind*. The firm specializes in providing fee for service financial planning, custom discretionary portfolio management and insurance. Doug is also a regular commentator on industry initiatives and an accomplished speaker at industry events.

"It is a great honor to be recognized for the **DAC Client Innovation Scholarship Award**. It is a real challenge for advisors to not only keep up with the pace of change in our industry today, but to actually be a leader through these times," said Mr. Nelson, upon learning of his recognition. "But it is through these tough times that there lies the greatest opportunities to differentiate yourself and make a significant impact with your client. It certainly isn't easy to do this, but this must always be the goal."

The **DAC Client Innovation Scholarship Award** is open to practicing advisors of all ages; actively engaged in the financial services industry for at least five years. Award recipients receive a scholarship to the Distinguished Advisor Conference, this year being held in Kelowna, B.C., November 5 to 8 and will participate in a panel discussion in front top advisors gathering from across Canada. Doug Nelson will join a panel hosted by [Braydon Skully](#), Senior Vice President, Investment Platform Division Franklin Templeton, to discuss client innovation as part of the conference theme, **Financial Advice at the Crossroads of Change**.

"Knowledge Bureau is pleased to recognize outstanding innovation in practice management through the **DAC CLIENT INNOVATION SCHOLARSHIP AWARD**. Today's outstanding innovators in client service are tomorrow's great leaders," said Evelyn Jacks, President, Knowledge Bureau. "Industry thought leader, [Doug Nelson](#) is an excellent choice for this award." /2

[Registrations to DAC](#) are accepted until October 31. Please call 1-866-953-4769. To compete next year, a completed application form, CV and written synopsis of their achievements may be submitted to Distinguished Advisor Conference (DAC) Client Innovation Award before **October 1, 2018**.

ABOUT THE [DAC CLIENT INNOVATION SCHOLARSHIP AWARD](#):

The award recognizes outstanding achievement for who have excelled in INNOVATIVE client services in six areas, below:

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
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.

The 2016 Inaugural Client Innovation Award Winner was Geoffrey Pennal, Investment Advisor, Portfolio Manager CIM, FCSI, CIBC Wood Gundy

ABOUT OUR AWARD SPONSOR



**FRANKLIN TEMPLETON
INVESTMENTS**

Franklin Templeton is a global leader in asset management serving clients in over 150 countries. We run our business with the same prudence we apply to asset management, staying focused on delivering relevant investment solutions, strong long-term results and reliable, personal service. This approach, focused on putting clients first, has helped us to become one of the most trusted names in asset management.



Knowledge Bureau™ is Canada's leading national educational institute for continuing professional development in the tax and financial services. It is focused on providing the knowledge, skills and confidence practitioners need to navigate the rapidly changing tax and economic environment their clients face in building sustainable wealth.



The Distinguished Advisor Conference brings thought leaders together to think strategically about the future of financial services and its impact on their work in family wealth management.