



## THE DISTINGUISHED NEW ADVISOR AWARD

**AWARD:** The winner receives a scholarship to attend the 2019 Distinguished Advisor Conference including hotel accommodation. Winners will have the opportunity to be featured on stage, offering thought leadership on the future of their industry, and be recognized in national media opportunities with Investment Executive and Knowledge Bureau. In addition, the winner will participate in an awards ceremony, video and photo opportunity at the Distinguished Advisor Conference.

**ELIGIBILITY:**

- actively engaged in the tax, accounting or financial services
- 5 years of industry experience

**APPLICATION REQUIREMENTS:**

- completed application form
- current c.v.
- business portrait photo

### AWARD CRITERIA

**Application deadline:** September 1, 2019

**Selection and Notification to Award Winner:** September 30, 2019

Award winner will demonstrate outstanding achievement in their field in the following categories:

1. **KNOWLEDGE AND SKILLS:** outstanding results serving client needs
2. **REFERRABILITY:** exceeds expectations in providing services
3. **INDUSTRY COLLABORATION:** an inter-advisory approach to specialized service needs
4. **PROFESSIONAL DEVELOPMENT:** demonstrated excellence in breadth of professional development activities
5. **COMMUNITY LEADERSHIP:** at work and/or in the community
6. **BUSINESS LEADERSHIP:** demonstrated skills in working with a team to grow the practice
7. **INNOVATION:** “out of the box” thinking in practice management.
8. **BUSINESS GROWTH AND RETENTION:** year-over-year results that demonstrate growth and retention rates

### ABOUT OUR SPONSOR

#### ABOUT KNOWLEDGE BUREAU

Knowledge Bureau™ is Canada’s leading national post-secondary 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 NEW ADVISOR AWARD APPLICATION

Please complete and return a copy via fax to 1-204-953-4762  
or scan and email to [Barbara@knowledgebureau.com](mailto:Barbara@knowledgebureau.com) by September 1, 2019

NAME: \_\_\_\_\_

FIRM: \_\_\_\_\_

DEALER or AFFILIATE COMPANY (if any): \_\_\_\_\_

Employee \_\_\_\_\_ Self Employed \_\_\_\_\_ Number of Staff \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY/PROV/POSTAL CODE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

PHONE: \_\_\_\_\_

WEBSITE: \_\_\_\_\_

YEARS IN BUSINESS: \_\_\_\_\_

**BOOK OF BUSINESS:**

	Size of Book of Business (\$)		Families/Clients (#)
	AUM	Revenue	
Current:			
3 years (est.)			
5 years (est.)			

**BRIEF INTRODUCTION OF WHO YOU ARE:**

**DESCRIBE YOUR SERVICE AND WHAT MAKES IT UNIQUE:**

**CAREER HIGHLIGHTS:**

**NOTEWORTHY ENGAGEMENTS AND BROADCASTING:**

**AWARDS AND RECOGNITION:**

**WORK-LIFE ACTIVITIES:**

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**THE DISTINGUISHED NEW ADVISOR AWARD CONSISTS OF 8 CRITERIA,  
PLEASE PROVIDE INSIGHT INTO EACH AREA AND HOW YOU HAVE ACHIEVED:**

- 1. KNOWLEDGE AND SKILLS:** outstanding results serving client needs

- 2. REFERRABILITY:** exceeds expectations in providing services

- 3. INDUSTRY COLLABORATION:** an inter-advisory approach to specialized service needs

- 4. PROFESSIONAL DEVELOPMENT:** demonstrated excellence in breadth of professional development activities

**5. COMMUNITY LEADERSHIP:** at work and/or in the community

**6. BUSINESS LEADERSHIP:** demonstrated skills in working with a team to grow the practice

**7. INNOVATION:** “out of the box” thinking in practice management

**8. BUSINESS GROWTH AND RETENTION:** year-over-year results that demonstrate growth and retention rates

*Please answer the following questions below as they pertain to the above criteria:*

**1. How did you maximize your potential in the past year?**

**2. Why should you be selected as the recipient of the DISTINGUISHED NEW ADVISOR AWARD?**

**3. What advice would you share with other advisors at the conference with regard to your success?**

**4. Have you ever been investigated by or suspended from practice by any governing body of your profession?**

YES NO

If YES, please explain:

**5. Please provide two business references:**

NAME: TITLE: COMPANY: PHONE: EMAIL:

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*By submitting your signature and application, you acknowledge that your picture and bio information may be used in the promotion of the Distinguished Young Advisor Award.*

Signature: \_\_\_\_\_

Date: \_\_\_\_\_