

# THE DISTINGUISHED NEW ADVISOR AWARD

FILL OUT  
THIS AWARD  
APPLICATION  
TODAY!

## AWARD:

The winner receives a scholarship to attend the 2021 Virtual Distinguished Advisor Conference. Winners will have the opportunity to be featured in an awards ceremony and to participate in a virtual segment offering thought leadership on the future of their industry. They'll also be recognized in national media opportunities with Investment Executive and Knowledge Bureau.

## ELIGIBILITY:

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

## APPLICATION REQUIREMENTS:

- Completed application form
- Current c.v.
- Business portfolio

## AWARD CRITERIA:

**Application Deadline: September 1, 2021**

**Selection and Notification to Award Winner: September 30, 2021**

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

- 1. KNOWLEDGE AND SKILLS:** outstanding service satisfaction in managing family wealth.
- 2. REFERRABILITY:** demonstrated excellence in exceeding expectations in providing services.
- 3. INDUSTRY COLLABORATION:** a commitment to an inter-advisory approach to services.
- 4. PROFESSIONAL DEVELOPMENT:** excellence in breadth of professional development activities.
- 5. COMMUNITY LEADERSHIP:** participation in 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 and client base development.
- 8. BUSINESS GROWTH AND RETENTION:** demonstrated business growth and retention rates.

## Let's Connect :

Phone: : 1-866-953-4769 | Email: [accounting@knowledgebureau.com](mailto:accounting@knowledgebureau.com) | <https://www.knowledgebureau.com>

# ABOUT THE SPONSOR

## ABOUT KNOWLEDGE BUREAU:

Knowledge Bureau is a widely respected education institute and publisher based in Canada. Our world-class education is innovative, informative, and in-depth, with an academic approach focused on knowledge, skill building, and leadership.

### THE DISTINGUISHED NEW ADVISOR AWARD APPLICATION

Please complete and return to:  
[barbara.mcrae@knowledgebureau.com](mailto:barbara.mcrae@knowledgebureau.com)

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

DEALER OR AFFILIATE COMPANY (IF ANY): \_\_\_\_\_

EMPLOYEE: \_\_\_\_\_ SELF-EMPLOYED: \_\_\_\_\_ NUMBER OF STAFF: \_\_\_\_\_

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

CITY/PROVINCE/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 YOU UNIQUE:**

**CAREER HIGHLIGHTS:**

**NOTEWORTHY ENGAGEMENTS AND BROADCASTING:**

**AWARDS AND RECOGNITION:**

**WORK-LIFE ACTIVITIES**

THIS AWARD  
CONSISTS OF 8  
CRITERIA:

PLEASE PROVIDE INSIGHT ...

- Each are below, numbered 1 to 8.
- How you achieved in each area.

**1. KNOWLEDGE AND SKILLS:** outstanding results serving clients 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. BUSINESS GROWTH AND RETENTION:** year-over-year results that demonstrate growth and retention rates.

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

Please answer the following questions, on the next two pages, as they pertain to the previous set of questions.

**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 or three 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 NEW ADVISOR AWARD.

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

For more details visit [www.knowledgebureau.com](http://www.knowledgebureau.com)  
or call toll-free 1-866-953-4769