**GENERAL INFORMATION:**

**Case studies:** To be submitted using this template form. Entries to be no longer than 750 words and submitted in PDF format.

**Stats & Testimonials:** All submissions should include stats and testimonials as supporting evidence (to be supplied in PDF format).

**Adviser Company Awards:** Please provide evidence over a 3-year period of turnover, profit, number of advisers and support staff (and of those advisers, how many actively sell protection) and the percentage of clients who take out protection products based on your firm’s advice.

**Award Category Definitions:** Details can be found at the end of this document.

**YOUR ENTRY SUBMISSION:**

|  |  |
| --- | --- |
| Award Category: |  |
| Company Name: |  |
| Name of person submitting award entry: |  |
| Social media account (for social media entries only): |  |
| Links to relevant posts (for social media entries only): |  |

Please tell us, in no more than 750 words, why you should be considered for this award category:

|  |
| --- |
|  |

**AWARD CATEGORY DEFINITIONS:**

# Individual Adviser Awards:

* **Best claims communication message or case study by an adviser**

*Case study relating to a customer claim where the adviser’s involvement has delivered an improved consumer outcome.*

* **Best use of video social media by an adviser**

*Examples of use of video in social media by an adviser to promote protection. Entrants must demonstrate the level of engagement achieved, how this has had a positive impact on their business and/or how they have reached people they might not have had contact with otherwise.*

* **Best use of social media by an adviser**

*Examples of use of text/image based social media by an adviser to promote protection. Entrants must demonstrate the level of engagement achieved, how this has had a positive impact on their business and/or how they have reached people they might not have had contact with otherwise.*

* **Outstanding new protection adviser (individual – entered industry in last 24 months)**

*Entry is limited to individual advisers who have entered the protection industry in the last 24 months. Entrants should demonstrate how they have achieved their qualifications, grown their client base and can highlight how they have helped increase protection sales in their firm and produced great customer outcomes.*

* **Best protection administrator/support staff**

*How an administrator/member of support staff has gone the extra mile to support their firm’s advisers and clients, how they have made an impact to the business and how they have helped achieve better client outcomes.*

* **Group Risk adviser of the year**

*An adviser specialising in the Group Risk space who can demonstrate how they are engaging employers in this area and also getting buy-in from employees (e.g. promotion of end benefits, training/education of employees on benefits available).*

* **Best protection advice from a non-protection specialist (financial planner, mortgage adviser or wealth adviser)**

*Demonstration by a non-protection specialist of how they increased the amount of protection they have sold, how they bring protection into client discussions and how protection plays a role in their ongoing servicing of clients. Entry to be supported by statistics to explain split of business and how protection sales have increased.*

# Prestige awards:

* **Above & Beyond Award**

*Submission of a case study by an adviser or adviser firm to demonstrate a situation or actions where they have gone above and beyond in supporting their client(s) and achieving an excellent outcome(s). This can relate to a single client/case or to improvements in procedures that have resulted in improved consumer outcomes across your client bank*

* **Outstanding performance in claims handling**

*A demonstration of exemplary performance and actions with regard to handing claims, e.g. examples of how the firm has either implemented processes or other initiatives which have delivered better consumer claims outcomes and/or experience.*