

Complete Nomination 2019

Personal Details

Full Name

Telephone

Mobile

Address

Email

Confirm Email

Professional Details

When did you start being responsible for signing off on personal financial advice?

Position

Company

License

Do you own your own business? If not, when did you commence with your current employer?

Yes No

DD-MM-YYYY

What areas of advice do you specialise in?

Add your Linked In profile

www.linkedin.com/in/yourname

Please provide your website details

Please attach your CV (max 5 pages)
Accepted file types: doc, docx, pdf, txt, rtf.

No file selected

Please upload a photo of yourself (max 128MB) Accepted file types: jpg, gif, png, tif, tiff, jpeg.

No file selected

Are you an AFA member?

Yes No

Are you planning to attend the AFA National Conference?(Please note – if you make the final round, there is an expectation that you will attend)

Yes No

Are you a member of other industry bodies ? If yes, please list

Yes No

Education

Qualifications - Please list your industry relevant education from most recent to least recent

Date Completed

Institution

Qualification

Are you studying at the moment? If yes, please provide details

Yes No

Do you have any plans for further formal professional development? If yes, please provide details

Yes No

Do you have a mentor? If yes, who are they and how have they helped you in your career?

Yes No

Rising Star Criteria

Please provide examples that illustrate: The quality of your advice (max 400 words)

Excellence in client engagement (max 400 words)

Innovation that you have introduced into the business, advice process or customer engagement (leads, on-boarding, or on-going management) (max 400 words)

Leadership of self(max 400 words)

Financial Services Guide

Please provide your FSG Accepted file types: pdf.

No file selected

Referees

To help us learn more about you we require two referees who may be contacted. One must be a client and we will need a testimonial about you from both of them.

Referee 1

Full name

Telephone

Position

Company

Email

Relationship to you

Testimonial

Referee 2

Full name

Telephone

Position

Company

Email

Relationship to you

Testimonial

