



OPEN TO UNREGULATED PRACTITIONERS ONLY

Estate Planning Consultant of the Year

Will writing consultants play a vital role in liaising with clients to ensure that their estate is planned out exactly as they wish. An often-overlooked role, Estate Planning Consultants are highly skilled in the estate planning process and provide exceptional personal service to clients and Will writers.

The winner of this category will be able to demonstrate a high level of expertise and industry knowledge. They will have an excellent conversion rate against target whilst intelligently managing the expectations and needs of their introducers and clients.

Criteria

The winner of this award will:

- demonstrate exceptional customer service to consumers, introducers and internal teams.
- evidence an increase in conversion which has helped grow the business.
- provide examples of providing tangible benefits to clients and strategic partners.
- evidence encouraged innovation in the firm and/or influenced improving processes around the client journey.
- demonstrate ability to “wow” their clients.