

OPEN TO UNREGULATED PRACTITIONERS ONLY

## Estate Planning Consultant of the Year

Estate planning consultants play a vital role in developing business, liaising with clients, and supporting professionals deliver exceptional outcomes for clients. Whether operating independently, or as part of a wider network, they are highly skilled in ensuring the client's estate is planned out exactly as they wish.

Their success is derived from a mix of focused business development, excellent inter-personal skills, and a high level of expertise and industry knowledge. The winner of this category will be able to demonstrate all these facets, and more.

### Criteria

The winner of this award will:

- demonstrate a commitment to learning/education/qualification that complements their role
- demonstrate exceptional customer service and support to consumers, introducers and internal teams
- evidence excellent conversion rate against target and how this contributes to the overall success of the firm
- evidence how they have encouraged innovation in the firm and/or influenced improving processes around the client journey
- show a proactive approach to risk mitigation process and protocols to protect clients.