

**OPEN TO UNREGULATED ESTATE PLANNERS ONLY**

## **Estate Planning Firm the Year - Boutique**

Estate planning is an increasingly catch-all term for SMEs offering a range of life and death planning services, including will writing, LPAs, trusts, estate administration and funeral planning.

This category welcomes submissions from firms who have less than 15 staff (including support staff) and provide on and/or offline solutions for clients. The winner of this award will demonstrate all round excellence within the area of estate planning; combining high levels of skills and technical ability with exceptional client service and business acumen.

The winning submission will also outline how the organisation delivers service excellence uniformly across the business ensuring the client is placed at heart of the experience with robust risk management and an effective client and referrer engagement strategy across the spectrum of estate planning products and services. The judges will be looking for evidence of how the team work together to contribute to the overall firm's success and the winner will showcase a team-based approach to practice with diverse mix of team members bringing a variety of skills and experience to the team to produce a winning combination.

### **Criteria**

The winner of this award will:

- demonstrate extensive development and progress as a business within the last year, including, but not limited to: strategy, growth, financial performance, technology and innovation, employee onboarding and development, diversity, and training
- demonstrate how a culture of excellence creates a balance between purpose and profit with demonstrable firm-wide adoption and buy-in; which in turn ensures staff are operating in the best interests of the client and the profession
- evidence innovation in employee support (both professionally and personally) with a proactive approach to training, mental health and wellbeing, equality, diversity and inclusivity, alongside bravery in managing workloads and fee setting
- evidence of active engagement with community and/or corporate initiatives
- demonstrate a clear approach to technology, IT security and cyber-crime prevention

Where possible, provide evidence of reviews/recognition/ testimonials/recommendations.