

**Best Financial Adviser (Insurance) of the Year**

**Entry Form Two**

This Award recognises an outstanding registered Financial Adviser working in the insurance sector and who has exercised care, diligence and skill in providing superior professional services to clients.

**Please download this Entry Form (Part Two) onto your PC, Laptop or other devices.**

Completed Forms (1 and 2 for entries in Categories 1 to 13) and Form 2 for entries in Categories 14 to 18 must be sent to **iba2021chipdawson@xtra.co.nz**

**Please do not fax, post, courier or send the completed forms through any other source.**

**Entrant Details**

|  |  |
| --- | --- |
| **Name** |  |
| **Position** |  |
| **Organisation** |  |
| **Physical Address** |  |
| **Postal Address** |  |
| **Email** |  |
| **Telephone** |  |
| **Fax** |  |
| **Declaration**I confirm that I am not aware of any issues\* which would harm the integrity of the Indian Business Awards.Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| \*In signing this entry, entrants confirm that there are no issues that may harm the integrity of the awards. These issues may include past, pending or anticipated actions involving the nominee which have resulted, or would result, in conviction for a serious offence. |

**Referee Details (Owner or Manager of the business)**

|  |  |
| --- | --- |
| **Name** |  |
| **Position** |  |
| **Organisation** |  |
| **Physical Address** |  |
| **Postal Address** |  |
| **Email** |  |
| **Telephone** |  |
| **Fax** |  |
| **Declaration**I confirm my support for and agreement to the content of the entrant’s entry for this category.Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

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| **Best Financial Adviser (Insurance) of the Year (750 words)** |
| **Name of Entrant:** |
| 1. Outline your qualifications and experience and give an example of the process you would follow in advising a client regarding insurance advice.
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| 1. Describe how you have shown an innovative approach in providing financial advice and won the respect of your organisation and/or peers.
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| 1. Provide a detailed example of a successful insurance mortgage plan, and include feedback from one or more satisfied clients.
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