

FPAMA’s Financial Planner of the Year Award

The Financial Planning Association of Massachusetts is pleased to announce that it is accepting nominations for the Financial Planner of the Year award. This award honors a practicing financial planner who has made outstanding contributions to the financial planning profession in the state of Massachusetts. Nominations are made by fellow FPAMA members and judged by a committee of our Past Presidents. The recipient will be honored at a special ceremony in December.

How to nominate

* The nomination form is available at [www.fpama.org](http://www.fpama.org) “Financial Planner of the Year Award.”
* Nominations are due Monday, December 3, 2012
* Only FPAMA members may submit nominations
* No self-nominations
* Awards Committee members are not eligible

Criteria

Prerequisites

* Currently prepares or supervises preparation of comprehensive financial plans
* Experienced in the major financial planning topics such as insurance, tax planning, investments, estate planning and retirement planning
* FPAMA member
* CFP® practitioner
* Nominees must be in good standing with the CFP board, regulatory agencies, and law enforcement authorities

Contributions (at least one must apply)

* History of involvement in the FPA of MA (attends meetings, committee membership, volunteer work)
* Community service (public speaking, teaching, pro bono)
* Career development for new entrants to the profession
* Advocacy on behalf of the profession with government, media, or other public or private centers of influence

Questions? Contact Kristin Beane at [admin@fpama.org](mailto:admin@fpama.org) or 855-54-FPAMA



Nomination Form 2012 FINANCIAL PLANNER OF THE YEAR AWARD

Deadline December 3, 2012

I am pleased to nominate the following person who has made outstanding contributions to the financial planning profession in the state of Massachusetts.

Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Firm \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

This individual is deserving of this award because: (You may use this form or attach a separate document)

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Your nomination will be strengthened by supporting material. Attach your supporting material to your submission.

Nominator \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Email \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Submit by October 1, 2012 to:

FPAMA Awards Committee

PO Box 76

Westborough, MA 01581

Fax: 781-207-0248

Email: admin@fpama.org

Questions? Call Kristin Beane at 855-54-FPAMA or email admin@fpama.org

Tips for Effective Nominations

* Do not assume that the judges know the nominee.
* Ask others who know the nominee to write a letter of support.
* Elaborate! Give a full and flattering profile of the nominee.
* Make sure your nomination can stand alone – the judges will not ask for more information about the nominee.
* Keep in mind that we are looking for how your nominee has helped to advance the financial planning profession. Does your nominee go “above and beyond?”
* Read the criteria again before submitting. After reading it again, did you say WOW to yourself?

(Contributed by Linda Homsey, Past President, FPAMA)