**Application form**

**Entry criteria**

In completing their entry, Accredited Financial Planning Firm™ applicants should clearly demonstrate the impact that the firm has made on the financial planning profession **within the past 12 months** and demonstrate that their firms have the resources to meet the requirements listed under each heading below:

a. **Contribution to the financial planning profession**, which may include:

• University/student sponsorship,

• Financial planning week participation,

• Any services to other professional firms etc

b. **Building best practice in your firm**, including :

• Policies and procedures that are consistent with the CISI’s Code of Conduct,

• All staff are aware of the financial planning service and how it differs from financial advice, and

• The firm’s business structure reflects a clear fiduciary responsibility to clients

c. **Service excellence and how it is measured by your firm** including:

• That most advisers are qualified to level 6 financial planning qualification, and

• That a full financial planning service, including cashflow modelling, is offered by default

• A clear and consistent fee structure,

• An understandable and visible investment philosophy

d. **Promotion of consumer awareness of financial planning**, including:

• A financial planning proposition that is clearly communicated to clients in marketing material,

• Website offering,

• Podcasts, use of social media, books published,

• Number of new clients added in the past year, number of clients lost.

Your completed application must not exceed, 2,500 words maximum and may, in addition, include up to three attachments that have been produced within the previous 12 months.

**Your Entry**

|  |  |
| --- | --- |
| Name of firm |  |
| Name of person completing this form |  |
| Your position in firm |  |
| Contact email |  |
| Contact telephone number |  |
| Website address |  |
| Word count |  |

Section A: Your contribution to the financial planning profession.

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Section B: Building best practice in your firm

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Section C: Service excellence and how it is measured by your firm

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Section D: Promotion of consumer awareness of financial planning

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