

Accredited Financial Planning Firm™ of the Year Award 2017
The Financial Planning Annual Conference & Gala Awards

Terms and Conditions



1. The Accredited Financial Planning Firm™ of the Year Award (“the Competition”) is being conducted by the Chartered Institute for Securities and investment (CISI), 20 Fenchurch Street, London, EC3M 3BY
2. Entry to the Award is open to all current the CISI Accredited Financial Planning Firms, except any firm that is:
 - a. a company involved in the Competition.
3. The 2017 Competition commences on Enter date and applications (i.e. fully completed entries) must be submitted in accordance with these terms and conditions by the closing time/date of Monday 21 August 2017 at 9am.
4. To enter the Competition, applicants must:
 - a. Complete the online application form, providing required data along with a 2,500 words maximum response to demonstrate the impact upon the profession that the firm has made within the last twelve months to Fpawards@cisi.org
5. Firms may only submit one entry to the competition. The CISI accepts no responsibility for incorrectly submitted, delayed, misdirected or illegible entries into this Competition. Firms who submit multiple entries will be judged on their first submitted entry only.
6. A panel of judges (“The Panel”) consisting of representatives from the CISI and invited experts will review the applications and select the winner. Entrants will be judged according to the calibre of their submission supported by the business data provided. The business data will only be used in connection with this competition. Members of the Panel may interview representatives of the applicant firms by telephone and/or email applicants at a mutually convenient time if further information is required.
7. The winner will be announced at the 2017 CISI Financial Planning Annual Conference. Their details will be subsequently published on the website and in various industry publications following announcement at the conference.
8. The final shortlist of candidates will be informed in early-August and will be requested to attend an interview with the judges on 5 September 2017 at CISI offices in London.
9. The winner will receive:
 - a. Major coverage in the CISI media including The Review Magazine, the CISI website and social media,
 - b. promotion of the company by the CISI to external media including consumer press,
 - c. Registration and a full pass to attend the Financial Planning Annual Conference 2017. If the winner has already booked their place for 2017, the free place will be carried over to the 2018 conference.
 - d. Hotel accommodation for two nights at this year’s conference. As above, if the winner has already booked accommodation for 2017, the accommodation will be carried forward to the 2018 event.

- e. Two free delegate places at the Accredited Financial Planning Firms™ Conference 2018,
 - f. Recognising Excellence trophy to be held for one year,
 - g. a framed certificate.
10. No cash alternative to the prizes will be offered. The prizes are not transferable. Prizes are subject to availability and we reserve the right to substitute any prize with another of equivalent value without giving notice.
 11. Chance plays no part in this Competition. The Panel's decision is final and no correspondence will be entered into. Any applicants or applications not complying with these terms and conditions or involving fraud or any other illegal activity may be disqualified by the Panel and/or replaced by another applicant at any time.
 12. By entering the Competition, all applicants confirm and agree that they will abide by these terms and conditions.
 13. The CISI is not responsible for any incorrect or inaccurate information, either submitted by the applicant on the Website, or for any technical error that may occur during the administration of this Competition including any omission, interruption, deletion, defect, delay in operation or transmission, network failures, technical problems or traffic congestion on the Internet or on the Website, software failure, theft, destruction, alteration or unauthorised access to the applications or any injury or damage to any person's computer related to, or resulting from, participating in this Competition.
 14. The CISI and its associated companies and agencies shall not be liable in any way (including, without limitation, in negligence) for any loss or damage whatsoever suffered (including, without limitation, indirect or consequential loss) or for any loss or damage or personal injury suffered or sustained in connection with using any prize, except any liability that cannot be excluded by law.
 - a. By entering the Competition, the Winner agrees to participate in publicity activities associated with the Award including interviews and photo sessions requested by the CISI.
 15. The information entrants provide will be used by the CISI for the purpose of conducting the Competition. The CISI is bound by the Data Protection Act. Entrants can access the personal information which the CISI holds about them by contacting us here.