



## 2016 DISTINGUISHED ADVISOR CONFERENCE (DAC) CLIENT INNOVATION SCHOLARSHIP

**DEADLINE OCTOBER 1, 2016**

### For Immediate Release

Applications for the 2016 **DAC CLIENT INNOVATION SCHOLARSHIP AWARD** are now being accepted. The award is open to practicing advisors of all ages; actively engaged in the financial services industry for at least five years. A completed application form, CV and written synopsis of their achievements may be submitted to Distinguished Advisor Conference (DAC) Client Innovation Award before **October 1, 2016**.

The 2016 DAC will be held in San Diego, CA, November 6-9, 2016. This year's theme is **SOAR HIGHER: Plan for your Greater Potential**. Delegates may register for this event until September 30 at early registration rates at [www.knowledgebureau.com](http://www.knowledgebureau.com) or by calling 1-866-953-4769.

"Knowledge Bureau is pleased to recognize outstanding innovation in practice management through the **DAC CLIENT INNOVATION SCHOLARSHIP AWARD** together with Franklin Templeton, Diamond Sponsor of DAC. We firmly believe that today's outstanding innovators in client service are tomorrow's great leaders. We are pleased to provide an opportunity to recognize their accomplishments, celebrate their aspirations, and foster opportunities for further thought-leadership," said Evelyn Jacks, President, Knowledge Bureau.

"Franklin Templeton has always believed in the value of professional investment advice. And though our industry continues to evolve against a changing regulatory and competitive landscape, we believe that the need for advice has never been greater. That's why we are proud and honored to be the inaugural sponsor of the **DAC - CLIENT INNOVATION SCHOLARSHIP AWARD** – an award that recognizes the great, innovative work that advisors are doing to enhance their knowledge and skills, improve their communications, build their networks, and ultimately deliver an exceptional experience to clients," said Duane Green, Managing Director, Canada, Franklin Templeton Investments Corp., who will be presenting the topic *FRONT & CENTRE: Navigating Change & Delivering Exceptional Client Experiences at the DAC conference*.

**About the DAC CLIENT INNOVATION SCHOLARSHIP AWARD:** The award recognizes outstanding achievement for who have excelled in INNOVATIVE client services in six areas, below. To apply complete the form attached:

1. **DIFFERENTIATED VALUE PROPOSITION:** how it is articulated, executed and received.
2. **NEW APPLICATION OF KNOWLEDGE AND SKILLS:** how continuous improvement has changed the way you manage family wealth with multiple generations.
3. **CLIENT RETENTION AND SATISFACTION:** demonstrable strategies to retain assets and enhance your client's experience and thereby satisfaction with your offering.
4. **REFERRABILITY:** your well-articulated program to grow business through referrals
5. **PROFESSIONAL COLLABORATION:** partnership with other circles of influence to enhance value to your client.
6. **OUT OF THE BOX THINKING:** new ways to communicate and connect with your clients & prospects.

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## ABOUT OUR INAUGURAL SPONSOR



Franklin Templeton is a global leader in asset management serving clients in over 150 countries. We run our business with the same prudence we apply to asset management, staying focused on delivering relevant investment solutions, strong long-term results and reliable, personal service. This approach, focused on putting clients first, has helped us to become one of the most trusted names in asset management.



**Knowledge Bureau™** is Canada's leading national post-secondary educational institute for continuing professional development in the tax and financial services. It is focused on providing the knowledge, skills and confidence practitioners need to navigate the rapidly changing tax and economic environment their clients face in building sustainable wealth.



The Distinguished Advisor Conference brings thought leaders together to think strategically about the future of financial services and its impact on their work in family wealth management.



**THE DISTINGUISHED ADVISOR CONFERENCE (DAC) CLIENT INNOVATION SCHOLARSHIP AWARD  
APPLICATION**

Please complete and return a copy via email to [Barbara@knowledgebureau.com](mailto:Barbara@knowledgebureau.com) by October 1, 2016

<b>Name</b>	
<b>Firm</b>	
<b>Address</b>	
<b>City/Province/Postal Code</b>	
<b>Email</b>	
<b>Phone with area code</b>	
<b>Website</b>	
<b>Years in Business</b>	

**BRIEF INTRODUCTION OF WHO YOU ARE:**

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**CAREER HIGHLIGHTS:**

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**NOTEWORTHY AWARDS, RECOGNITION, SPEAKING ENGAGEMENTS, BROADCASTING**

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**WORK-LIFE ACTIVITIES:**

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## THE DAC CLIENT INNOVATION SCHOLARSHIP AWARD CRITERIA

*In answering each question below, please think about the following questions the judges will be considering as they read your answers :*

- How have you maximized your potential for delivering innovative solutions to your clients?
- Why should your practice be selected as the recipient of the DAC CLIENT INNOVATION SCHOLARSHIP AWARD?
- What advice would you share with other Advisors at the conference with regard to your success?

1. DIFFERENTIATED VALUE PROPOSITION: how it is articulated, executed and received.

2. NEW APPLICATION OF KNOWLEDGE AND SKILLS: how continuous improvement has changed the way you manage family wealth with multiple generations.

3. CLIENT RETENTION AND SATISFACTION: demonstrable strategies to retain assets and enhance your client's experience and thereby satisfaction with your offering.

4. REFERRABILITY: your well-articulated program to grow business through referrals

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5. PROFESSIONAL COLLABORATION: partnership with other circles of influence to enhance value to your client.

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6. OUT OF THE BOX THINKING: new ways to communicate and connect with your clients & prospects.

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By submitting your signature and application, you acknowledge that your picture and bio information may be used in the promotion of the Distinguished Advisor Conference and **the DAC CLIENT INNOVATION SCHOLARSHIP AWARD.**

Signature	Date

Please complete and return a copy via email to [Barbara@knowledgebureau.com](mailto:Barbara@knowledgebureau.com)