



## THE DISTINGUISHED ADVISOR CONFERENCE (DAC) YOUNG ADVISOR AWARD APPLICATION

Please complete and return a copy via email to [Barbara@knowledgebureau.com](mailto:Barbara@knowledgebureau.com) by May 31, 2016

**Name:**

**Firm:**

**Address:**

**City/Province/Postal Code:**

**Email:**

**Phone with area code:**

**Website:**

**Age and Years in Business:**

**BRIEF INTRODUCTION OF WHO YOU ARE:**

**CAREER HIGHLIGHTS:**

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

**WORK-LIFE ACTIVITIES:**



## THE DAC YOUNG ADVISORS AWARD CRITERIA

*Please answer the following questions below as they pertain to the criteria BELOW:*

1. How have you maximized your potential in 2015?
2. Why should you be selected as the recipient of the 2016 YOUNG ADVISORS AWARD?
3. What advice would you share with other Advisors at the conference with regard to your success?

1. **KNOWLEDGE AND SKILLS:** outstanding results managing family wealth

2. **REFERRABILITY:** exceeds expectations in providing services

3. **INDUSTRY COLLABORATION:** an inter-advisory approach to specialized service needs

4. **PROFESSIONAL DEVELOPMENT:** demonstrated excellence in breadth of professional development activities



5. **COMMUNITY LEADERSHIP:** at work and/or in the community
  
6. **BUSINESS LEADERSHIP:** demonstrated skills in working with a team to grow the practice
  
7. **INNOVATION:** “out of the box” thinking in practice management
  
8. **BUSINESS GROWTH AND RETENTION:** year-over-year results that demonstrate growth and retention rates

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 Young Advisor Award.

**Signature:**

**Date:**

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