



Heart of Financial Planning Award Nomination Tips and Guidance

“In the arena of human life the honors and rewards fall to those who show their good qualities in action.” – Aristotle

Guidance around nominations

- No nominations or supporting documents will be accepted after the deadline.
- Self nominations are not accepted.
- Current FPA National Board of Directors, Heart of Financial Planning task force members and FPA staff are not eligible to nominate or be nominated.
 - Past winners may be nominated again as long as it is based on a new body of work.
 - Past nominees not selected may be re-nominated, but must a new form must be submitted.
- You do not need to be an FPA member to nominate.
- You do not have to be an FPA member to be a nominee.

“We will receive not what we idly wish for but what we justly earn. Our rewards will always be in exact proportion to our service.” – Earl Nightingale

Tips for nominations

- Reach out to other people that know the nominee and ask their help to write something to include in the nomination form.
- If a spouse or business partner is nominating, another individual must submit a nomination letter on the nominee’s behalf.
- Elaborate enough to give a full and flattering profile of nominee.
- Do not assume that the task force knows the nominee.
- Make sure the letter can stand alone – the task force will not ask for more information about the nominee.
- Keep in mind that we are looking for the extraordinary things your nominee did to help advance the financial planning profession and support FPA’s core values.
 - Does your nominee go above and beyond his or her job description as they reach out to the community or those who need our service?
 - Read the nomination form again before submitting. After reading it again, did you say WOW to yourself?
- See sample nomination forms below.

“You are not here merely to make a living, you are here in order to enable the world to live more amply, with greater vision, with a finer spirit of hope and achievement. You are here to enrich the world, and you impoverish yourself if you forget the errand.” – Woodrow Wilson, U.S. President