



After filling out the nomination form for the Heart of Financial Planning Award, the following are sample nominations that might guide you through the expanded Core Values essay portion:

Sample #1 Heart of Financial Planning Award Nomination Form

Financial Planning Association Core Values

Competence:

Nominee's non-profit background, tireless, multi-organizational involvement, thirst for knowledge and unique ability to break complex ideas into fresh information make them a strong educator and mentor.

Integrity:

Nominee's intent, deeds and actions all flow towards their dream that all people, regardless of income have knowledge of their need for and access to high quality, low cost, conflict free financial planning.

Collaboration/Relationships:

Nominee served as a chapter president for FPA of _____. In this role, they served as a liaison between FPA National and the local chapter, advising National as to how the organization could support the chapter's community outreach efforts and also providing National with constructive ideas that could disseminate to other chapters across the country.

Stewardship:

Nominee is always thinking about the long-term. Recognizing the need to train volunteers on how to provide financial planning to the underserved, *Nominee* led efforts to create a local public outreach training program, which included conducting seminars and individual consultations.

This program provides education and training to the volunteers and it is now used nationwide as a training and recruiting platform for public awareness committee members.

Summary:

I cannot think of a person better qualified or more deserving than *Nominee* to be honored the Heart of Financial Planning Award. *Nominee's* worthiness is self-evident. Their high energy, enthusiasm, sense of humor, depth of empathy, emotional facility, intellectual liveliness and attitude make *Nominee* the perfect Heart of Financial Planning awardee. *Nominee* deserves to be recognized for all of their tireless efforts.



Sample #2 Heart of Financial Planning Award Nomination Form

Financial Planning Association Core Values

Competence:

Nominee is a role model for financial planners. They encourage and mentor planners and chapter leaders, epitomize ethical financial planning, and serve as a leader in FPA and the financial industry.

Integrity:

Nominee has been at the forefront of developing a standard of competence for the financial planning profession.

Collaboration/Relationships:

Nominee vigorously supports and encourages individuals improve their practice and pool resources with other planners to elevate the profession.

Stewardship:

Nominee mentors directors of local boards to provide better services to increase and retain members. They personally mentor new planners and senior planners to improve their practices and better serve their clients. *Nominee* opens their office to allow planners to see how their practice works and opens their books so planners can understand the finances of a practice.

Summary:

This *Nominee* epitomizes the reason that the Heart of Financial Planning Award was created. The *Nominee's* integrity, willingness to give time and energy to increase the competence and success of financial planners speaks volumes to the *Nominee's* veracity and proficiency. The *Nominee's* unflagging support of planners, chapter leaders and the financial planning community through time, counseling and donations has made tangible and profound changes to our profession.