



AFA Great Advice Awards 2021 Application Form

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Adviser name and AFA member no.	Adviser state

Licensee name and licensee contact number	Licensee name	Licensee contact number	Licensee email address
Referee name and referee contact number	Referee name	Referee contact number	Referee email address

The client's background
(note: please do not use surnames, however, include gender, age, past or current occupation, hobbies, etc)

Background on your relationship with this client,
including how it started and the length of the relationship

The client's advice need(s) or goal(s) and other relevant considerations

The implemented strategy(ies) and services provided to the client*

*A maximum of 150 words per question will be allowed in the response.



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The impact of the strategy(ies) in achieving the need or goal – what was the impact/outcome in terms of:
1) Financial 2) Emotional 3) Behavioural

What would have happened if the client had not received your advice?

Feedback received from the client on the value of your advice and your advice relationship

Note: Date specific advice provided must be after 1 January 2020

*A maximum of 150 words per question will be allowed in the response.

I am a current AFA member and an authorised financial adviser providing personal advice to clients. The client example I have provided in this application is true and accurate and was provided post 1 January 2020. I understand that if short listed I will be contacted to provide the relevant SOA (privacy requirements will apply) and the referee I have provided will be contacted. I am also aware that due diligence checks will be completed and that the judges decision will be final.

Signature _____

Date _____