

Do your clients refer their friends to you without asking?

If not, why not?

Research tells us that it is common for people to tell their friends about services that they value. So how do you offer services of greater value? We know that there are very few ways for you to get meaningful feedback on the value of the financial planning that you do for your clients. That is the primary purpose of our competition - to provide non-judgemental critique to planners entering our competition. To help you get better.



The 2019 PlanPlus Canada Financial Planning Awards

Part of the PlanPlus Global Awards Program

On February 15th we opened the door to the 2019 [PlanPlus Canada Financial Planning Awards](#).

Top judges

We have a panel of five financial planning expert judges. The judges have standard scoring guidelines to follow (which can be studied in advance). The judges will provide a helpful written critique to all the finalists. This competition is unique inasmuch as it based on the amount of value created for the client.



Here's what last year's winner said

“Participating in the PlanPlus Global Financial Planning has honed our financial planning skills; thereby better serving our clients. Many of us have heard the Proverb “iron sharpens iron”. In a similar manner my success in 2017 has helped our entire team planning improve, leading to a great team effort and success in 2018. I encourage my fellow financial planning professionals to enter this very worthwhile professional contest.”

PAUL TYERS - WINNER

What's in it for a planner?



Besides the critique, we also send announcements directly to 100 people of your choice announcing you as a winner. A certificate of achievement is issued for just submitting an entry.

The winner is invited to attend the [CIFPs Annual Conference](#) to receive their award. The award will be presented during the conference which will be held at the Westin Bayshore in Vancouver, BC from Sunday, June 2 through Wednesday, June 5, 2019. For the winner we will cover their airfare, hotel, and admission to the conference.

Entering is easy

You don't have to create a new plan to enter the competition. In fact, we want you to base your entry on a financial plan that you have already presented to a client. Don't worry, you are requested to redact the names of your client(s) and they will remain anonymous. Your Initial Submission is based on answers to questions about your plan. If you get to the finals, then the judges will see your plan. Full confidentiality is always observed, thus your plan is fully redacted.

You need to get a competitors number as soon as possible as the number of competitors we can handle is capped. You can go [here](#) to register and to get your number to make sure that you get in. Once registered your Competitor Number will be sent to you. Once again make sure you [go here](#) to get the rules and your competitor number.

Helpful Webinar to Guide You

If you have never entered before, you will likely find this incredibly helpful. We will cover:

- Guidance in doing a plan
- How to select the right plan to enter
- How to structure your entry
- Rewards for entering
- Answers to your questions



[Register](#)

The founding sponsor is the [Canadian Institute of Financial Planners](#). They are joined by [Institute of Advanced Financial Planners](#), and the [Institut québécois de planification financière \(IQPF\)](#)