

NOMINATE NOW!.....for the Heart of Financial Planning Award

The Financial Planning Association[®] of San Francisco is seeking nominations for our local award of the Heart of Financial Planning. Your nomination could be an FPA individual member, a financial planning firm, an associated industry professional (e.g. attorney, CPA, professor, journalist) or any other organization or individual that you believe has done extraordinary work to contribute or give back to our financial planning community and/or the public through enhancing the values of the financial planning process.

Please print legibly. Nominee Name:			
Nominee type:			
☐ FPA member with	Chapter	☐ Financial Planning firm	
☐ Non-profit organization☐ Other	III / tilled professional	☐ FPA Chapter	
Please check the area which your nominee is making an extraordinary contribution: (check all that apply)			
□ Pro Bono	☐ Financial literacy	□ Community education	
☐ FPA member education	☐ Professional innovation	•	
☐ FPA Chapter support	☐ Other		
Provide a short explanation describing why your nominee should be considered for this award. If you are recommending a company or organization, focus on the contribution of the company or organization. (if additional room is needed, use open space on opposite side)			
Briefly describe how the nominee demonstrates each of the following FPA core values: (see opposite side for description of core values and additional space for comments) Competence			
Integrity			
Collaboration/Relationships			
Stewardship			
Nomination submitted by:			
E-mail:	Pr	none: ()	
Relationship to nominee			
Please let us know where you heard about the award			

Each nomination will be reviewed for this award before an award selection is made. You may be contacted for additional details or clarification. We appreciate your submission. Please send your nomination via e-mail to the FPA SF Executive Director, Holly Wilkerson, at info@fpasf.org by 11/30/2017.



Financial Planning Association Core Values

Competence: Our dedication to competence requires not only lifelong learning, but also that we continually assess our ability to appropriately and effectively address the needs of those we serve.

Integrity: We strive to have ever more congruence between our words and deeds, and to deliver genuine value to those whom we serve.

Relationships: We are committed to open, inclusive and respectful relationships, including collaboration among diverse parties on common interests.

Stewardship: We recognize our responsibility to act with vision, ever mindful of the effects of our actions today and tomorrow on the future.			