



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
- Non-profit organization
- Other _____
- Financial Planning firm
- Allied professional
- FPA Chapter

Please check the area which your nominee is making an extraordinary contribution:
(check all that apply)

- Pro Bono
- FPA member education
- FPA Chapter support
- Financial literacy
- Professional innovation
- Other _____
- Community education

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: _____ Phone: () _____

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.

