Wealth Management Industry Awards
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Wealth Management 2026 Industry Awards Program

Helpful Hints for Completing Your Nomination

STEP 3: NOMINATION INFORMATION

Nomination Categories
Refer to the dropdown menu to review category options.

There are a total of 28 general categories to select from. Many of the general categories have subcategories to further refine your category selection. Once you make your primary category selection, subcategory options will automatically appear if applicable.

Nomination Type
There are two different types of nominations for your consideration.

- **Company initiative:** If you are nominating a company initiative, select the category that aligns with your company, and if applicable, a subcategory for your nomination. For example, if your company identifies as an Asset Manager and your initiative is a new or enhanced ETF tool or program, then you would select Asset Manager (Initiatives) for your category and ETFs as the subcategory. There are a total of 100 (sub)categories for initiative nominations.

- **Individual executive/leader:** If you are nominating an individual in one of the leadership subcategories, you would select the category that aligns with your company and the executive's role. For example, if your company identifies as a Technology Provider and your executive is the Chief Marketing Officer, you would select Technology Provider (Executives) for your category and Chief Marketing Officer of the Year as the subcategory. There are a total of 30 (sub)categories for executive nominations.

Category Criteria
- Each category and subcategory has its own set of criteria and list of questions to help you explain what makes your nomination unique and worthy of recognition.

- Once you select your category/subcategory from the pulldown menu, the category criteria and questions for your response will automatically appear.

Nomination Title
The title of your nomination should be brief (6 to 8 words preferred), descriptive and clearly identify the company initiative or individual executive you are submitting for nomination.

- **For a company initiative,** be sure to state the type of initiative being nominated (i.e. an application, a campaign, a platform, a report, etc.), as well as a few non-promotional descriptive words to clearly identify your initiative.

- **For a company executive/leader,** type the individual's name, title and company as you would like them to appear in print and online (i.e. Joe Smith, CEO, XYZ Corporation or Joseph P. Smith, Chief Executive Officer, XYZ, etc.)

QUESTIONS FOR INITIATIVE NOMINATIONS

If you opt to nominate an initiative, the following series of questions will appear to help you describe and identify the initiative to the judges. The use of clear descriptions, metrics, usage stats and evidence showing how the initiative facilitated advisor success will be important for the judges as they evaluate each nomination.

Initiative Type
You can select either a NEW initiative, which is obviously a recently introduced program/project, or an ENHANCED initiative. **If you are nominating an enhanced initiative, be sure to provide details in your answers to explain the specific enhancement that was made to an existing project.**

Initiative Timeframe
Please note that the initiative you nominate needs to be recent. You will be asked to verify that your initiative has been launched or developed within the last 18 months.

Initiative Description
This question will give you the opportunity to briefly define and explain either the new initiative or the enhancement you are submitting for nomination. ***NOTE:*** This information will be used in promotion of the Industry Awards, Finalists and/or Winners both online and in print.

Initiative Goals
This question is where you will briefly state the primary goal(s) of the new initiative or enhancement. ***NOTE:*** This information may be used in promotion of the Industry Awards, Finalists and/or Winners both online and in print.

Initiative Results

This is where you should quantitatively provide support that shows how the results of the new or enhanced initiative met your goals. Refer to the category criteria as a benchmark for evaluation as well, specifically noting how the new or enhanced initiative met the stated criteria of the category. ***NOTE:*** **any information provided in response to this specific question WILL NOT be made public or shared with anyone other than the judging panel.**

Initiative Impact
Tell us how the new or enhanced initiative made an impact on the financial advisor community. Specifically, how has it helped the community and contributed to the success of financial advisors. ***NOTE:*** This information may be used in promotion of the Industry Awards, Finalists and/or Winners both online and in print.

QUESTIONS FOR COMPANY EXECUTIVE OR TEAM LEADER NOMINATIONS

If you opt to nominate a company executive or team leader, the following series of questions will appear to help you present the merits of the candidate to the judges. The use of clear descriptions, metrics, stats and evidence showing how the nominee facilitated advisor success will be important for the judges as they evaluate each nomination.

Nominee Role
This question gives you the opportunity to briefly describe the role of the individual you are nominating and the scope of his or her responsibility within the company and/or industry. ***NOTE:*** This information will be used in promotion of the Industry Awards, Finalists and/or Winners both online and in print.

Nominee Achievements
This question is where you will briefly state how the nominee has met the criteria for this category over the last 18 months. Refer to the category criteria as a benchmark for evaluation, specifically noting how he or she met the stated criteria of the category. ***NOTE:*** This information may be used in promotion of the Industry Awards, Finalists and/or Winners both online and in print.

Company Results
This is where you should provide quantitative and qualitative results demonstrating the results your company has experienced due to your nominee's leadership efforts and abilities over the last 18 months. ***NOTE:*** **any information provided in response to this specific question WILL NOT be made public or shared with anyone other than the judging panel.**

Industry Impact
Tell us how your nominee's leadership and achievements have set a positive example and made a measurable impact on the financial advisor community over the last 18 months. ***NOTE:*** This information may be used in promotion of the Industry Awards, Finalists and/or Winners both online and in print.

Executive Headshot and Contact Information
A headshot of the executive you are nominating must be uploaded to complete the nomination process. Instructions and file specs are included on the nomination form. ***NOTE:*** **We also require that you provide the email address of the person you are nominating for internal purposes only. That information will not be made public.**

STEP 4: MATERIALS UPLOAD AND FINAL SUBMISSION

Logo Upload
The logo of the company whose initiative or executive is being nominated must be uploaded to complete the submission process. Instructions and file specs are clearly noted on the nomination form.

Optional Materials
You'll also have the opportunity to upload additional support materials to add a further dimension to your nomination. Optional uploads include:

- **Support Documents**: You can include up to two collateral pieces for judge review such as marketing materials, white papers, research reports, survey results, etc. Please note in your description which documents support which points in your nomination. ***NOTE:*** **Support documents WILL NOT be made public or shared with anyone other than the judging panel.**

- **Multimedia Upload:** You can also upload a video to further enhance your nomination. Specs are included on the nomination page.

- **Team Photo:** You're invited to upload a photo of the team members associated with your nomination. The photo may be used on the Awards website or in promotion of the Awards program**.**