

### **The Paul Etheridge Financial Planning Future Leader Award 2024**

1. The Paul Etheridge Financial Planning Future Leader Award (“the Competition”) is being conducted by the Chartered Institute for Securities and Investment (CISI), 20 Fenchurch Street, London, EC3M 3BY.
2. Entry to the Competition is open to any individual working in the Financial Planning sector who is either a CISI member, holds a CISI qualification or is studying for one except those who currently are voting board members, principals or business owners.
3. The 2024 Competition applications (i.e. fully completed entries) must be submitted in accordance with these terms and conditions by the closing dates as outlined below.
4. The stages of the competition are as follows;

**First round:** Complete the application form (answering all questions) and submit to [FPawards@cisi.org](mailto:FPawards@cisi.org) by **11:59pm on Wednesday 12 June 2024**. This can be submitted as either 750 written words or in a digital dialogue (video or podcast) under 5 minutes in length.

A panel of judges (“The Panel”) consisting of representatives from the CISI, award sponsors, press and the Financial Planning community will review the applications and shortlist two applicants to progress. Entries will be judged on the responses submitted exclusively. Applicants will be notified of the outcome of the first round on **Thursday 18 July 2024**.

**Second round:** The top two shortlisted Applicants will be invited to attend an interview with the Panel on **Friday 20 September 2024**. This will take place via video call. The Panel will select an overall Winner.

5. Applicants may only enter the Competition once. The CISI accepts no responsibility for incorrectly submitted, delayed, misdirected or illegible entries into this Competition.
6. The Winner will be announced at The Financial Planning Conference 2024. Their details will be subsequently published on the website and in various industry publications following the announcement.
7. General feedback by way of comments from the Panel will be made available on request once the Winners have been announced.
8. The Winner will receive:
  - a) £1000 in cash.
  - b) Feature on a CISI website.
  - c) Profile on CISI social media channels.
  - d) Announcement in *The Review*.
  - e) As well as a trophy and the accolade of winning.

9. The Winners must take the prizes as specified above. Where applicable, the prizes cannot be redeemed for cash, exchanged or transferred to another person. The Winner acknowledges and agrees that all other costs associated with the prize, including taxes and other ancillary costs, are their own responsibility.
10. The CISI may without notice combine the awards and prize fund if it is deemed that there are insufficient entries.
11. Chance plays no part in this Competition. The Panel's decision is final, and no correspondence will be entered into. Any applicants or applications not complying with these terms and conditions or involving fraud, or any other illegal activity may be disqualified by the Panel and/or replaced by another applicant at any time. The CISI reserves the right to undertake at any time any verification checks of the application submitted.
12. By entering the Competition, all applicants confirm and agree that they will abide by these terms and conditions, they are the person who submitted the application, and the application is their own work. Applicants who submit multiple entries will be judged on their first entry only.
13. The CISI is not responsible for any incorrect or inaccurate information, either submitted by the applicant, or caused by equipment or programming used in this Competition, or for any technical error that may occur during the administration of this Competition including any omission, interruption, deletion, defect, delay in operation or transmission, network failures, technical problems or traffic congestion on the internet or on the Website, software failure, theft, destruction, alteration or unauthorised access to the applications or any injury or damage to any person's computer related to, or resulting from, participating in this Competition.
14. The CISI and its associated companies and agencies shall not be liable in any way (including, without limitation, in negligence) for any loss or damage whatsoever suffered (including, without limitation, indirect or consequential loss) or for any loss or damage or personal injury suffered or sustained in connection with using any prize, except any liability that cannot be excluded by law.
15. By entering the Competition, the Winner agrees to participate in publicity activities associated with the Award including interviews and photo sessions requested by the CISI or the award sponsors.
16. The information entrants provide will be used by the CISI for the purpose of conducting the Competition in accordance with the CISI privacy policy.