



2017 Invest in Others Awards Nominations Process

Advisor Nominations – Deadline: April 19, 2017

If you're nominating an advisor, you will be asked to provide the following information in order to provide us with a full picture of the advisor's contributions. We recommend partnering with the advisor's designated non-profit to complete the nomination.

About the Advisor Nominee:

- Advisor's contact information
- Advisor's broker-dealer or custodian
- FINRA CRD# and/or professional designations
- Your relationship to the advisor and why you're nominating them
- How many years the advisor has been affiliated with the non-profit
- The number of hours per month the advisor volunteers with the non-profit
- The advisor's personal monetary donations to the non-profit in fiscal years 2014, 2015, and 2016
- How much money the advisor has helped the non-profit raise in fiscal years 2014, 2015, and 2016

About the Non-Profit:

- Contact information for a representative of the non-profit
- Non-profit's tax ID number
- Non-profit's mission and number of people served annually

Required Attachments:

- Letter from the Advisor
The advisor nominee should tell us a compelling story about his or her service for the selected non-profit. This should be limited to 750 words and include the following:
 - Personal motivation for becoming involved with the non-profit
 - Specific contributions made to the organization's mission and greatest needs
 - Experiences derived from serving the non-profit and community
 - Impact on the non-profit and community
- Letter from the Non-Profit
A representative from the non-profit should comment on the advisor nominee's contributions to the organization. This should be limited to 750 words and include the following:
 - How long the advisor has been involved with the organization and the average number of hours the advisor volunteers per month
 - Specific duties and tasks performed by the advisor, including leadership positions held
 - How the advisor's service has contributed to the non-profit's mission and greatest needs
 - Measurable ways the advisor has impacted the non-profit and community
- Photos
Provide 3-5 photos of the nominee in action with the non-profit and/or photos of the constituents served by the non-profit.

All nominations MUST be submitted through the Online Nominations Portal found at investinothers.org/nominate by April 19, 2017. If you have additional questions, please email info@investinothers.org or call (781) 304-4812.