



2023 Invest in Others Awards

## Invest in Others Awards

The Invest in Others Awards recognize the charitable work of financial advisors in communities across the country and around the world.

There are two stages for a financial advisor that must be completed for them to be considered as a finalist:

1. Nomination form (part 1) asks for contact information to help us verify eligibility. Invest in Others confirms that the nominee & nonprofit information meets our eligibility criteria.
2. The nominee will be invited to complete the application (part 2) for the opportunity to be considered as a finalist.

Please review eligibility criteria to confirm that the financial advisor and nonprofit charity are suitable for this program. Eligibility criteria can be found on page 2 of this document.

## Nominations Process

In order to be considered for the Invest in Others Awards, the financial advisor must volunteer with a US based charity. Nominations can be made by anyone, including advisor themselves. There is no limit to the number of advisors one person can nominate.

The following information will be required for your nomination to be considered:

### About the Financial Advisor/Nominee:

- First Name and Last Name
- Company Name
- Company Address, City, State & Zip
- Telephone Number
- E-mail
- LinkedIn URL
- FINRA or IAPD # (for the individual advisor, not the firm)
- Broker-Dealer or Custodian

### About You/the Nominator:

- First Name and Last Name
- Company Name
- Telephone Number
- E-mail
- Relationship to Advisor

### About the Nonprofit:

- Nonprofit Organization Name
- Nonprofit Address, City, State & Zip
- Tax ID Number (can be found at [charitynavigator.org](https://charitynavigator.org))
- Nonprofit Contact Name & E-Mail

All nominations MUST be submitted through the [Online Nominations Portal](#)

**Nominations must be submitted by April 5, 2023.**

*If you have additional questions, please email [info@investinothers.org](mailto:info@investinothers.org) or call (781) 304-4812.*



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### Eligibility

Please visit our [FAQ page](#) for more detailed information and common questions we have encountered in the past 17 years.

### Financial Advisor-

- Must be currently working as registered representatives (i.e. Series 7), registered investment advisors, **OR** financial planners with a professional certification.  
*Please refer to FINRA's list of designations for examples.*
- Must be active financial advisors, defined by spending at least 75% of their time providing financial consultation with clients (households or organizations).
- Must have worked in this capacity as an active financial advisor for at least three years.
- Must have a record of volunteer involvement with the nonprofit organization that is current and ongoing for at least three years.

### Nonprofit-

- Must be U.S.-based organizations and educational institutions with tax-exempt status granted under the Internal Revenue Code Section 501(c)(3).
- Nonprofits doing work internationally or in another country are eligible if they are a U.S.-based organization with tax exempt status granted under the Internal Revenue Code Section 501(c)(3).

Check the tax exemption status of the nonprofit organization with: [IRS](#), [Charity Navigator](#), [GuideStar](#)

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