



Invest in Others

liO Awards Nomination Process
2024 Overview



About Invest in Others

The Invest in Others Charitable Foundation supports nonprofits by leveraging the resources, time, and talents of financial professionals to serve communities in need.

	liO Awards	Charitable Champions	Grant Program
Program details	Recognizes financial advisors who are making a difference with charities across the country and the world	Annual list that recognizes firms that give back by promoting a culture of philanthropy amongst their financial advisors and employees	Grants for Good and Grants for Change provide funding to meet the critical needs of nonprofits
Who can apply/be nominated?	Financial Advisors	Financial Advisory Firms	Anyone in the financial services community
Grant amount?	\$2,000-\$100,000	-	Grants up to \$20,000

Through our programs, Invest in Others (liO) helps individuals in the financial services community amplify their charitable work and have an even bigger impact in their communities. Learn more at <https://www.investinothers.org/what-we-do/>.



Invest in Others Awards

The Invest in Others Awards recognizes the charitable work of financial advisors in communities across the world. The awards are presented at the annual Invest in Others Awards Gala every September.

- **Nominations Deadline:** March 29, 2024
- **Recipients Announced:** September 19, 2024 at the liO Awards Gala at the Omni Boston Hotel at the Seaport



2023 liO Award Recipients



Carl Bailey
Volunteer of the Year
- Danbury Grassroots Academy



Anasuya Meyer
Emerging Impact
- Daya Inc.



Paul Martel
Lifetime Achievement
- Partners For Andean Community Health



Cristen Morgan
Community Service
- Hope House Foundation

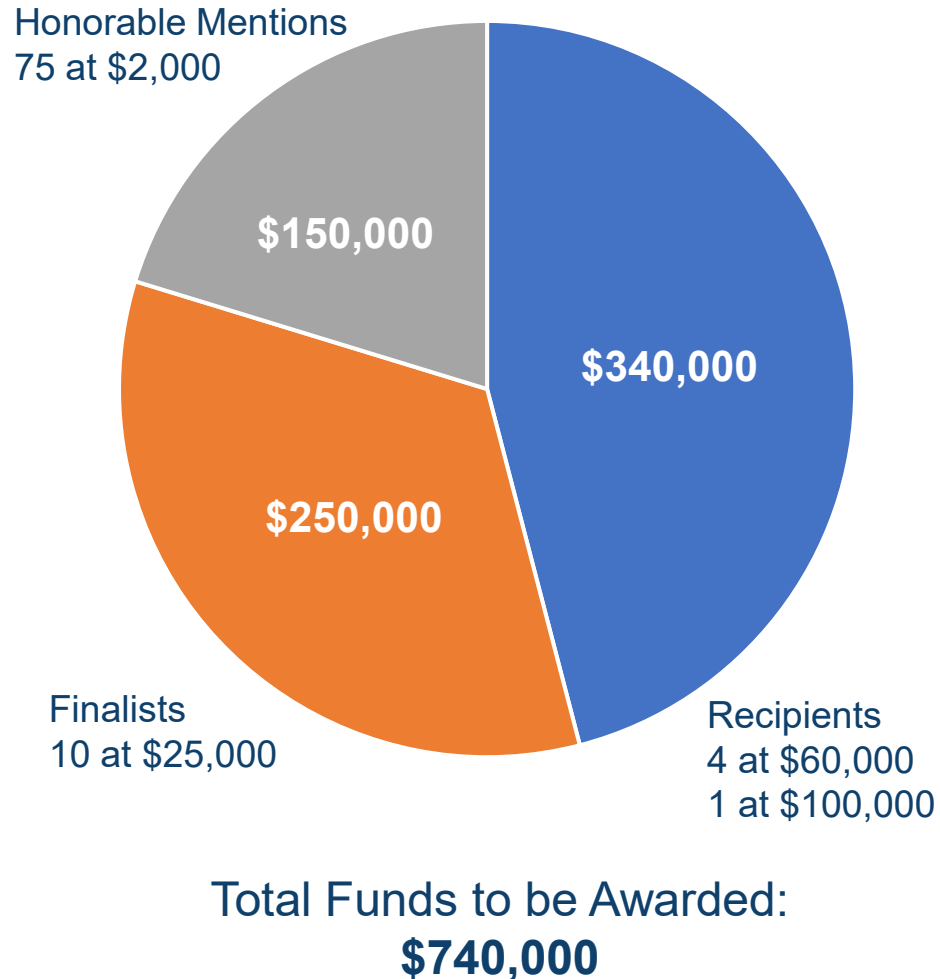


Brady Murray
Catalyst Award
- RODS Heroes



Award Categories and Funding

Award recipients will receive grants from Invest in Others for their designated charities:



Catalyst Award

(Think Initiative) For positive change and displaying entrepreneurial vision and leadership to a nonprofit organization for at least **3 years**. This may involve rejuvenating an organization from failing to thriving or helping to launch a new nonprofit organization.



Community Service Award

(Think Leadership) For outstanding impact through leadership contributions to a nonprofit organization for at least **3 years**. They have contributed to the long-term sustainability of the nonprofit and have a record of motivating and inspiring others. This includes serving with distinction as a fundraiser, board member, or other executive position.



Emerging Impact Award

(Think Rising Star) For an advisor **45 years of age or younger** who is making a mark in their community through their outstanding commitment of time, talent, and resources to a nonprofit over a period of at least **3 years**.



Volunteer of the Year Award

(Think Hands-On) For significant impact on a nonprofit as a volunteer of at least **3 years** by working hands-on and giving of their time, talent, and energy to make a lasting impact on the organization, those it serves, and the community at large.



Lifetime Achievement Award

(Think Longevity) For a profound contribution to a nonprofit organization through an established history of distinguished service, where they exhibited leadership, provided inspiration, and gained recognition and respect from peers and the community over a period of at least **20 years**.

Part One (Due by 3/29)

Nomination Form

- Anyone can submit
- OK to nominate multiple advisors
- Advisors can self nominate

Approximately 1-3 days

Internal Eligibility Verification

- liO confirms that advisor and nonprofit meet eligibility criteria

Part Two (Due by 4/26)

Application Form

- Advisor is invited to complete a detailed application to be considered for judging

Submit nominations online via investinothers.org/awards by **Friday, March 29**

1

Contact Info for the Financial Advisor/Nominee

FINRA or IAPD # (for the nominated advisor, not the firm)

2

Contact Info for the Nominator

3

Contact Info for the Nonprofit

Including its Tax ID Number (can be found at [IRS](#), [Charity Navigator](#), [GuideStar](#))

Submit nominations online via investinothers.org/awards by **Friday, March 29**

Financial Advisors

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

Nonprofits

- 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](#)

Additional information about eligibility can be found at investinothers.org/awards



Nominate an advisor by March 29, 2024



Share our call for nominations within your networks

Submit nominations online via investinothers.org/awards by **Friday, March 29**

- **Nominations Deadline:** March 29, 2024
- **Applications Deadline:** April 26, 2024
- **Finalists Announced:** July 15, 2024
- **Winners Announced:** September 19, 2024
at the liO Awards Gala at the Omni Boston Hotel at the Seaport

Submit nominations online via investinothers.org/awards by **March 29th**

Questions? Visit our [FAQs](#) or email info@investinothers.org