

Finance Broker of the Year – All States & Territories

This is an individual award that is open to any Finance Broker and is based on the period from 1 July 2021 - 30 June 2022.

CATEGORY DESCRIPTION

This award recognises the top-performing residential/personal Finance Broker for the financial year 2021/2022 in each state and is open to all brokers who meet the category requirements. This category assesses loan settlement and loan book performance, plus year-on-year growth in loan volumes and loan book. Conversion rates, submission quality and customer servicing capabilities will also be evaluated as part of this award.

To qualify for this award, entrants must have:

- At least two full financial years of experience (must be concurrent years)
- A year-on-year increase in individual annual settlement volumes greater than five per cent
- A year-on-year increase in individual loan book value greater than five per cent

All details provided for this award relate to individual performance and only those **Mortgages/Commercial/Personal finance transactions lodged and settled by you are to be included**. The information provided will be corroborated with your aggregator/brokerage.

SUBMISSION REQUIREMENTS - Please ensure all of these are completed.

1. Complete an awards submission form for the category.
2. Provide full business metrics; form found in entry submission documents. Failure to provide full details may negatively impact your submission. All business metrics are strictly confidential and will not be published.
3. The entrant must submit a detailed submission that answers/address the points below:
 - Highlight how they have structured their business and offering to service the wider financial needs of consumers.
 - Demonstrate any market specialisation plus tactics, strategies, and success in driving business from that sector.
 - Highlight innovation in their business and how that has impacted business growth.
 - Provide case studies or examples that showcase how they cater for the needs of clients and how that influences business success.
 - A three (3) minute video submission on why they should be considered as Broker of the Year in your relevant state

BUSINESS METRICS AND PERFORMANCE

Item	Financial year 2020	Financial year 2021
Volume(\$) of residential / commercial / personal finance transactions (Please input \$ figures to the nearest thousand e.g., \$10,552,000)		
Number of residential / commercial / personal finance transactions		
Loan book value(\$) - residential / commercial / personal finance transactions (Please input \$ figures to the nearest thousand e.g. \$10,552,000)		
Conversion rate (%) residential / commercial / personal finance transactions		



SUBMISSION FORM

OPEN RESPONSES - Mandatory Field

Please complete each question in 300 words or less (word counts must be strictly adhered to).

Attach your answers and any supporting documents (up to 5 only), files no larger than 200kb

1. Please describe your point of difference/unique selling points when servicing the residential mortgage needs of borrowers.
2. Please describe the strategies you have used to grow your residential mortgage settlements, the number of loans written and loan book during the financial year 2021/2022, and why these strategies yielded results.
3. What was your greatest achievement in mortgage broking during financial year 2021/2022?

LODGING YOUR SUBMISSION

1. Include the award submission form on the first page of each printed submission.
2. Include business metrics, as requested, on the second page of the submission.
3. Deliver the submission before or on the submission deadline.
4. Once you are ready to submit, please contact Leah Renwick (leah@fbaa.com.au) or Phillipa Byrne (pbyrne@fbaa.com.au) at FBAA for your confidential upload link.