FINANCIAL PLANNING ASSOCIATION OF SINGAPORE (FPAS)

Financial Planner Awards Singapore Application Form 2026

60 Paya Lebar Rd #13-37 Paya Lebar Square S409051 | Tel: 62092611 | Email: events@fpas.org.sg

Venue: Mandarin Oriental, Singapore| Date: 06 October 2026 (Tuesday)| Time: 6.30pm – 10.30pm (Doors open at 6pm)

EARLY BIRD PRICING – ENJOY $188 OFF APPLICATION FEES

A. Procedures

1. Complete **Sections B, C, D, E & F** which are mandatory;
2. For endorsement of the Total FYC / Total Premium / Total Income, and BSC in 2025 on **Section D,** Applicant must obtain verification/endorsement from the **Authorised Officer of the Company;**
3. A latest **colour** photo (in digital format, high resolution).
   NOTE: your application will not be processed if black & white photo is submitted.
4. Please refer to the **Terms & Conditions** on **Section H** (page 2) of this application form.

B. Applicant Information

Name in NRIC (Mr/Miss/Mrs/Ms)	Designation		
Name on Digital Certificate and Trophy **(Same name for all; Name in NRIC would be used if this field is left blank)**		IG: @ LinkedIn: @ (for tagging purposes)	
Company Name	NRIC	DOB (dd/mm/yyyy)	
Office Address	RNF No.	Race	
Company Email	Alternate Email		
Handphone No.	Are you a FPAS Member? YES / NO Membership ID:	Are you CFP certified? YES / NO	

C. Award Criteria (Annex A)

Criteria[1] – Professional Excellence			Criteria[1] – Professional Achievement					ALL
Category	**Filing Fee[3]**	**(a) PCWP[2] Scoring**	**Category**	**Filing Fee[3]**	**(a) Min. Total FYC 2025**	**(b) Min. Total Premium 2025**	**(c) Min. Income Production 2025**	**(d) BSC**
Distinguished Leader	**$888**	75 – 100	**Platinum**	**$888**	$362,500	$1,085,000	$627,000	A
			Gold	**$788**	$145,000	$434,000	$250,800	A
Emerging Leader	**$688**	50 – 74	**Silver**	**$688**	$72,500	$217,000	$125,400	A
			Bronze	**$588**	$50,000	$149,000	$86,000	A

Note: 1. Criteria: **Applicant must fulfil the indicated criteria.**
2. Professional Contribution Write-Up (PCWP) will be evaluated and scored (Refer to Annex 1 for write-up details)
3. Filing Fee includes: a banquet dinner seat, newspaper advertising, personal social media EDM, recognition in event magazine and a trophy.
4. Other terms and conditions apply, refer to Section H.

D. I am applying for: ❑ EARLY BIRD Pricing - $188 OFF ❑ STANDARD Pricing

1. Please tick (1) option: ❑ **Professional Achievement Category** ❑ **Professional Excellence Category** (Refer to Annex 1 for details)

2. Please tick one Category: ❑ **Platinum** ❑ **Gold** ❑ **Silver** ❑ **Bronze**

Practitioner – Either One (a, b or c)
(a) Total FYC in 2025: S$_____ **OR**

(b) Total Premium in 2025: S$_____ **OR**

(c) Total Income in 2025: S$_____ **AND**

(d) BSC Scoring: _____

Professional
(a) PCWP Scoring: _____

(d) BSC Scoring: _____

E. For Company Verification/Endorsement

The above figures are to be endorsed by an Authorised Officer from your Company.
As the **Authorised Officer of the Company**, I certify that the figures indicated in Section D above are accurate and correct.

_____
Name

_____ _____
Designation Signature/Company Stamp/Date

F. Purchase of Additional Seats/Tables for Guests [the Filing Fee includes one (1) seat for the Applicant]

❑ **$278** per seat	No. of Seats:	Amount $
❑ **$258** per seat (min. 3 seats to be booked)	No. of Seats:	Amount $
❑ **$2,288** per table (total: 10 seats)	No. of Tables:	Amount $
❑ **$2,188** per table (min. 3 tables to be booked)	No. of Tables:	Amount $
	Sub-Total	**Amount $**

G. Payment Mode & Authorisation

1. Awards Category (Section C)	$
2. Purchase of additional Seats / Tables (Section F)	$
3. Total Amount Payable	$

Please tick one option: **Will you be attending the Awards Dinner?** ❑ **Yes** ❑ **No**
Please tick one option: **If Yes, do you need any special meals?** ❑ **Chinese (default)** ❑ **Halal** ❑ **Vegetarian**

Payment Mode: Bank: _____ PAYNOW Name or Handphone No: _____

❑ **PAYNOW – UEN S99SS0008L**

Kindly indicate the following description clearly in the PAYNOW transaction and email the screenshot to events@fpas.org.sg

<Name> <Mobile No.> <FPASAwards26>

- I hereby authorise FPAS to obtain all sources such as additional information as it deems relevant in connection with this application.
- I hereby agree to cooperate fully in obtaining and submitting such additional information and documents, including but not limited to waiving of any privileges under applicable privacy law.
- I hereby instruct every person and organisation having such additional information and documents to disclose it, without incurring liability to me, to FPAS upon FPAS's request.
- I confirmed the figures furnished in Section D are accurate and correct.
- FPAS is committed to protecting our members and subscribers' personal data in accordance with the Singapore Personal Data Protection Act (PDPA).
  In line with the PDPA, by submitting this form, I hereby give my consent to FPAS to collect, use and disclose my personal data for the purposes of administering and processing of payments for membership and events and/or to receive further information from FPAS and/or for communication pertaining to my membership, event and course information.
  I am aware that I may update the personal data and/or withdraw the consent provided by me at any time by contacting **events@fpas.org.sg** or to unsubscribe via FPAS emails.

_____
Signature of Applicant/Date

H. Terms and Conditions

1. **Applicant must be a FPAS member**; non-FPAS members are to contact FPAS for membership application form.
2. All fees paid are non-refundable/non-transferrable for other FPAS events and/or courses.
3. FPAS reserves the right to cancel or postpone the event, alter the content and timing of the event.
4. Confirmation of application shall only be made upon receiving the FPAS Application Form, colour photo & payment.
5. **Submission of the completed FPAS Application Form, PAYNOW payment and colour photo can be sent via email indicated on top of the form.**
6. **Group application of 5 and above, will enjoy additional 20% off early bird rate.**
7. **Closing Date: 11 September 2026. Incomplete submission or late submission will not be processed.**

For FPAS Office only

Received on: ..... Processed On: ..... Receipt No. ..... Initial: .....

ANNEX A: A Better Understanding of the FPAS Annual Financial Planner Awards 2026 Award Criteria

Recognising Excellence in All Dimensions

The FPAS Annual Financial Planner Awards celebrate both professional excellence and professional achievement. While one route recognises outstanding client service and consistent professional performance, the other honours leadership and contributions that create a lasting impact on society, the profession, organisations, and the community.

By recognising excellence through these two qualifying routes, FPAS aims to encourage CFP professionals to pursue the highest standards of competence, ethics, and service while actively contributing to the continued advancement of Singapore's financial planning profession.

Professional Excellence Category

The Professional Excellence Route recognises CFP professionals whose contributions have strengthened the financial planning profession through initiatives that benefit the industry, organisations, society, and the community.

This route honours members who have made significant contributions in areas such as:

- Social and public financial literacy initiatives;
- Development of the financial planning industry;
- Organisational and company-level professional development;
- Community engagement and volunteerism; and
- Other initiatives that strengthen the standards, reputation, and future of the financial planning profession.

(Please refer to Annex 1 of the application form for details)

Through this route, FPAS recognises that professional excellence is also reflected in the willingness of CFP professionals to mentor others, share knowledge, promote financial literacy, support industry development, and contribute to the wider community.

Professional Achievement Category

The Professional Achievement Route recognises CFP professionals who have consistently delivered high-quality financial planning advice and services to their clients.

Qualifying members are assessed based on consistent delivery of quality financial planning services:

- Strong professional production records in FYC, FYP or Earned Income; and
- Achievement of a Balanced Scorecard (BSC) Grade A, reflecting high standards of professionalism, compliance, and client-centric advisory practices.

This route acknowledges CFP professionals who have maintained excellence in serving clients while upholding the highest ethical and professional standards expected of the CFP certification.

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ANNEX 1: Professional Contribution Write-Up (For Professional Excellence Category Applicants)

Please submit a concise write-up detailing your professional experience and contributions. Your submission should demonstrate your excellence in your field, the impact of your work on business outcomes, and your ability to lead and influence others. You are also encouraged to highlight your contributions to the industry, as well as your commitment to ethical practices and good governance.

All submissions will be evaluated based on the above criteria and scored accordingly to determine the appropriate award category. Submit your write-up to events@fpas.org.sg with any supporting documents.

Component
Professional Excellence
Business Impact
Leadership & Influence
Industry Contribution
Ethics & Governance

Professional Excellence (30%)

This component evaluates your **mastery of profession**, depth of expertise, and consistency in delivering high-quality outcomes. It focuses on how well you perform your role.

- Describe your role and responsibilities clearly
- Highlight key achievements or milestones during the assessment period
- Explain why our work stands out compared to peers
- Include measurable results where possible (eg. Performance rankings, awards, qualifications, client outcomes, testimonials)

Business Impact (25%)

This component measures the **tangible value** you have created for your organization, clients or stakeholders.

- Clearly describe the challenge or opportunity
- Explain your role, actions taken and results achieved (eg. Percentages, growth, time saved)
- Successful projects, initiatives or strategies led or contributed
- Positive impact on client satisfaction, retention or business sustainability

Leadership & Influence (15%)

This component evaluates how you **lead, mentor, influence, or inspire others**, regardless sof formal title.

- Describe leadership roles or situations (formal or informal)
- Share examples of guiding, mentoring, or developing others (can be supported with testimonials)
- Explain how your leadership improved outcomes or people
- Reflect on influence beyond individual performance

Industry Contribution (15%)

This component recognizes contributions that **advance or uplift the industry as a whole,** beyond your own organization.

- Describe activities that benefit the wider industry or profession
- Explain your role and level of involvement
- Highlight the reach or influence of your contribution (eg. Knowledge sharing, training, advocacy, etc)
- Emphasise long-term or collective impact (efforts to raise professional standards or awareness)

Ethics & Governance (15%)

This component evaluates your **integrity, ethical conduct, and commitment to good governance.**

- Describe how you uphold ethical standards in your work
- Share examples of responsible decision-making or compliance
- Highlight actions taken to promote ethical awareness or governance (eg, transparency, fairness, etc)
- Demonstrate integrity, even in challenging situations