



AFPF of the Year Award 2026 T&Cs

The Accredited Financial Planning Firm™ of the Year Award (“the Competition”) is being conducted by the Chartered Institute for Securities and investment (CISI), 20 Fenchurch Street, London EC3M 3BY. Entry to the Award is open to all current CISI Accredited Financial Planning Firms™, with the exception of any firms whose staff are involved in the judging of the competition. The 2026 Competition applications (i.e. fully completed entries) must be submitted in accordance with these terms and conditions by the closing date as outlined below.

The stages of the competition are as follows:

1. Complete your firm’s submission, answering all questions and providing required data, keeping to the 2,500 word limit, to demonstrate how the firm has met the awards criteria within the last twelve months. Applications should be completed by Monday 13 July 2026. Please be aware that entries are allowed a maximum of three attachments that have been produced within the previous 12 months – any attachments will not form part of the application word limit. A panel of judges (“The Panel”) consisting of representatives from the CISI, Chair of the Accredited Financial Planning Firms committee and a previous award winner will review the applications and shortlist two applicants to progress to the final interview stage of the competition – should the judges wish to interview more than two firms then this is something they can do at their discretion. Applicants will be judged according to the calibre of their submission supported by the business data provided. The application will only be used in connection with this competition. Applicants will be notified of the outcome of the first round on Monday 17 August 2026.
2. The top two shortlisted applicants will be invited to attend a 30-minute interview with The Panel on Tuesday 08 September 2026. This will take place via video call. Shortlisted applicants will be given 15 minutes to explain what their firm has done in the last twelve months and why they feel they should win the award, followed by a Q&A with The Panel. The Winner will be announced at The Financial Planning Conference taking place on 8-9 October 2026. Their details will be subsequently published on the website and by press release to various industry publications.

By entering the Competition, the Winner agrees to:

- Participate in publicity activities associated with the Award including interviews and photo sessions requested by the CISI™ or the award sponsors.
- The public disclosure of their entry to be used as a benchmark for existing and potentially new Accredited Financial Planning Firms™.



The Winner will receive:

- One free ticket and accommodation for The Financial Planning Conference 2027.
- A feature on the CISI website, in The Review magazine and on the CISI social media channels.
- A trophy to be awarded at the gala dinner as the Financial Planning Conference 2026.

The Winner must take the prizes as specified above. Where applicable, the prizes cannot be redeemed for cash, exchanged or transferred to another person. The Winner acknowledges and agrees that all other costs associated with the prize, including taxes and other ancillary costs, are their own responsibility. The CISI may without notice combine the awards and prize fund if it is deemed that there are insufficient entries.

General feedback by way of comments from 'The Panel' will be made available upon request to Jamie.watt@cisi.org once the winner has been announced. The judges' decisions are final, and no judge will enter into conversation or correspondence about decisions that have been made.

Firms may only submit one entry to the competition. The CISI accepts no responsibility for incorrectly submitted, delayed, misdirected or illegible entries into this Competition. Firms who submit multiple entries will be judged on their first submitted entry only.

Chance plays no part in this Competition. The Panel's decision is final, and no correspondence will be entered into. Any applicants or applications not complying with these terms and conditions or involving fraud or any other illegal activity may be disqualified by The Panel and/or replaced by another applicant at any time. The CISI reserves the right to undertake at any time any verification checks of the application submitted.

Your entry will be judged on its merits and principally on the basis of the information provided in your entry. The Panel's decision shall be absolutely final and binding on all entrants. The information entrants provide will be used by the CISI for the purpose of conducting the Competition in accordance with the CISI privacy policy.

The entrant confirms that this submission was conceived, created, and executed by themselves. Generative artificial intelligence tools were not used for ideation, drafting, rewriting, editing, visual creation, audio creation, or enhancement of the work.

The sole permitted use of AI is limited to basic spelling correction that does not alter wording, meaning, structure, or creative intent.

If additional AI use is suspected judges may request supporting evidence such as early drafts, original research, project notes, photos and screen shots of the workings out /your process.



By entering the Competition, all applicants confirm and agree that they will abide by these terms and conditions, they are the person who submitted the application, and the application is their own work. Applicants who submit multiple entries will be judged on their first entry only.

The CISI is not responsible for any incorrect or inaccurate information, either submitted by the applicant, or caused by equipment or programming used in this Competition, or for any technical error that may occur during the administration of this Competition including any omission, interruption, deletion, defect, delay in operation or transmission, network failures, technical problems or traffic congestion on the internet or on the website, software failure, theft, destruction, alteration or unauthorised access to the applications or any injury or damage to any person's computer related to,

The CISI and its associated companies and agencies shall not be liable in any way (including, without limitation, in negligence) for any loss or damage whatsoever suffered (including, without limitation, indirect or consequential loss) or for any loss or damage or personal injury suffered or sustained in connection with using any prize, except any liability that cannot be excluded by law.