

Call for Nominations –

The Insight Award for Customer Advocacy in Financial Services

Honoring financial communications initiatives that empower customers to make fully informed choices and successful purchase decisions

Deadline: January 28, 2008

Do you work for, or know of, an organization that is especially good at communicating information about financial services to its customers? Then submit today for the 2008 Insight Award for Customer Advocacy in Financial Services!

First presented in 2006, the Insight Award program honors financial communications initiatives that empower customers to make fully informed choices and successful purchase decisions. Sponsored by Art Plus Technology, the Award is presented annually and is judged by an independent panel of recognized experts in financial communications.

The winner will be announced at the 2008 Financial Communications Forum, which will be held April 15-16, 2008 at the Princeton Club of New York.



What to Nominate

The Insight Award program honors “communications” in the broadest sense, encompassing information and materials, printed and digital, that are provided to inform people or assist in making decisions about their financial services.

Examples include:

- Plan enrollment literature and forms
- Account statements
- Transactional documents like trade confirmations
- Prospectuses and other disclosure documents
- Newsletters and other educational publications
- Brochures, inserts, emailers, or messages on statements
- Internet resources such as self-help tools
- Educational and customer/consumer advocacy materials

Eligibility Requirements

Financial communications initiatives encompassing all media types and geographies are welcome. To be eligible, they must:

- have been produced for clients, prospects, or the broader public
- have been delivered between January 1, 2007 and January 1, 2008
- contain no confidential information, or have such information masked
- be in English

How to Nominate

Please provide the following for *each* communications initiative you nominate:

- Nine (9) copies of the physical piece, or nine (9) CDs with the digital image of the piece (either scanned image of a physical piece or screen captures of an online piece). Please note: submitted materials cannot be returned.
- A fully-completed Entry Form (below)
- Payment of the nomination fee, which covers up to three (3) initiatives (non-profit and government organizations are exempt)
- **Entries must be received by the close of business on January 28, 2008.**

Judging Criteria

Submissions are judged by a nine-person panel of independent experts in financial communications. Criteria for selection include:

1. *The Ability to Demystify*. How well does the communication simplify complex data or concepts?
2. *Use of Plain English*. Does the communication provide information in clear, simple language? Have arcane codes and jargon been replaced with descriptions intelligible to the layman?
3. *Degree of Transparency*. Does the communication disclose, fully and legibly, important information, such as fees? What's in the fine print?
4. *Presentation of Choice*. Does the communication volunteer information about other potential choices for products and services, including from sources other than the firm?
5. *Educational Value*. Does the communication provide or point to more information on a topic or issue?
6. *Innovation*. Do the features cited in the nomination represent a significant advance over current "best practices" in financial communications?

Award Presentation

The Insight Award will be presented in a special session at the Financial Communications Forum, which is taking place April 15-16, 2008 at the Princeton Club of New York. Representatives of the organizations whose initiatives are named as Finalists (including the Winner) will be contacted in advance and will receive both a special certificate and complimentary passes to the event. In addition, Finalist and Winner organizations will be identified in separate press releases announcing their achievement.

Entry Form -

The Insight Award for Customer Advocacy in Financial Services

Deadline: January 28, 2008

Please use one form per nominated initiative. After completing it, please make eight (8) copies and submit all nine (9) with either nine (9) copies of the physical piece or nine (9) CDs with the digital image of the piece (either scanned image of a physical piece or screen captures of an online piece).

Primary Contact for Information About the Nominated Communication

Name: _____

Title: _____

Company: _____

Address: _____

Phone: _____

Email: _____

Name of the Organization You are Nominating

Name of the Communications Initiative You are Nominating

Name of the Person to Whom to Present the Award, if Selected

Your Name and Contact Information (if different than Primary Contact)

Name: _____

Title: _____

Company: _____

Address: _____

Phone: _____

Email: _____

