



## 2026 PLANADVISER Emerging Leaders

PLANADVISER is looking for the next generation of leaders across the retirement plan advisement space.

The PLANADVISER Emerging Leaders recognition is given to those who have worked in the retirement plan advisory industry for at least three years, but no more than 15—whether the person focuses on advising, operations, client relations, data, participant education or some other piece of the business.

Nominations for Emerging Leaders open in May. PLANADVISER vets the nominees in July, and the list makers are announced in August. Anyone working with a person who has Emerging Leader qualities may nominate that person, and self-nomination is allowed. If a nomination comes from a colleague besides the firm's senior adviser, we reach out to get the senior adviser's endorsement.

The 2026 PLANADVISER Emerging Leaders get extra recognition at the PLANADVISER 360 event in November. Additionally, a half-day of networking and educational opportunities is dedicated to this up-and-coming group along with others early in their retirement plan advisory industry careers. The deadline for nominations is June 12, 2026.

If you have any questions, please email [awards@issmediasolutions.com](mailto:awards@issmediasolutions.com).

**Q2 Your Information**

- First name: (1) \_\_\_\_\_
- Last name: (2) \_\_\_\_\_
- Business title: (3) \_\_\_\_\_
- Your email address: (4) \_\_\_\_\_
- Firm/company name: (5) \_\_\_\_\_
- Street address: (6) \_\_\_\_\_
- City: (7) \_\_\_\_\_
- State: (8) \_\_\_\_\_
- ZIP: (9) \_\_\_\_\_
- Phone: (10) \_\_\_\_\_

**Q3 Who is the Emerging Leader you are nominating?**

- First name: (5) \_\_\_\_\_
- Last name: (13) \_\_\_\_\_
- Firm/company name: (7) \_\_\_\_\_
- Email address: (4) \_\_\_\_\_
- Street address: (8) \_\_\_\_\_
- City: (9) \_\_\_\_\_
- State: (10) \_\_\_\_\_
- ZIP: (11) \_\_\_\_\_
- Phone: (12) \_\_\_\_\_

**Q4 Please provide the contact information for the lead adviser for the Emerging Leader you are nominating:**

- First name: (5) \_\_\_\_\_
- Last name: (13) \_\_\_\_\_
- Email address: (4) \_\_\_\_\_
- Title: (14) \_\_\_\_\_
- Firm/company name: (7) \_\_\_\_\_
- Street address: (8) \_\_\_\_\_
- City: (9) \_\_\_\_\_
- State: (10) \_\_\_\_\_
- ZIP: (11) \_\_\_\_\_
- Phone: (12) \_\_\_\_\_

**Q5 How many years has this person worked in the retirement plan advisory industry?**

- Less than a year (8)
  - 1-3 years (9)
  - 3-5 years (10)
  - 5-7 years (4)
  - 7-10 years (5)
  - 10-15 years (6)
  - More than 15 years (7)
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Q6 Why should this person be recognized? (1500 characters)

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Q7 May we reference you in contacting the person you nominated for the Emerging Leaders recognition?

Yes (1)

No (2)

Q8 Thank you for your submission for the 2026 PLANADVISER Emerging Leaders. **To submit your survey, click the blue SUBMIT button below.** You will be offered a chance to download a copy of your response for your records after submission. **If you are NOT ready to submit your response,** please exit this form now and return when ready (your data has been saved). Please contact [awards@issmediasolutions.com](mailto:awards@issmediasolutions.com) with any questions.