



## **2026 PLANADVISER Excellence in Operations Nomination Form**

PLANADVISER is looking for the retirement plan advisory firm leaders that “make the practices run” and support the advisers who are the faces at the forefront of the industry.

The Excellence in Operations is recognition for more senior non-adviser operations staff. It complements the PLANADVISER awards that honor advisers, to recognize the vital personnel of an advisory practice—whether focusing on operations, data, investment analytics, provider management, or some other piece of the business.

After all, the Retirement Plan Advisers of the Year and the Top Retirement Plan Advisers don’t get to the top all by themselves! Nominations for Excellence in Operations open in May. PLANADVISER vets the nominees in July, and the list makers are announced in August. Anyone working with a person who shows Excellence in Operations qualities may nominate that person, and self-nomination is allowed.

The 2026 PLANADVISER Excellence in Operations award recipients will be recognized at the PLANADVISER 360 event in November. Additionally, the conference will host opportunities for networking and educational opportunities specifically for this group of people. 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: (5) \_\_\_\_\_
- Last name: (13) \_\_\_\_\_
- Business title: (14) \_\_\_\_\_
- Your email address: (4) \_\_\_\_\_
- Firm/company name: (7) \_\_\_\_\_
- Street address: (8) \_\_\_\_\_
- City: (9) \_\_\_\_\_
- State: (10) \_\_\_\_\_
- ZIP: (11) \_\_\_\_\_
- Phone: (12) \_\_\_\_\_

**Q3 Who are you nominating for Excellence in Operations recognition?**

- 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 person 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 years or more (6)
- Not Applicable (7)

**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 Excellence in Operations recognition?**

- Yes (1)
- No (2)

Q8 Thank you for your submission for the 2026 PLANADVISER Excellence in Operations recognition. **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.