

## India wins big at PlanPlus Financial Planning Awards

Lovaii Navlakhi of International Money Matters emerges winner from Asia.

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Bengaluru-based adviser Lovaii Navlakhi of [International Money Matters](#) has won the global PlanPlus Financial Planning Awards 2018 from the Asia region. The first runner up was Vivek Rege of [V R Wealth Advisors](#) while [the second runner up was Vishal Dhawan of Plan Ahead Wealth Advisors.](#)

The Global Financial Awards selects top financial planners among three regions: America, Europe and Asia.

“This is the first time that the winner as well as the runner ups are from India. It’s a great honor. Winning this award on a global platform is testimony to the growing importance of this profession and value addition done by financial planners in India,” says Lovaii Navlakhi of International Money Matters.

The awards acknowledge financial advisers who provide extraordinary value to their clients. Talking about the methodology of the award, John A. Page, Chairperson and Adjudicator, PlanPlus Global Financial Planning Awards says, “While monetary benefits are important to people, our focus is overall value. For example, peace of mind, or freedom from worry about money. The amount of value that an adviser creates for a client is a very rigorous adjudication process. Any adviser who holds a professional designation such as CFP, is in good standing with their local financial adviser associations and works on a fiduciary basis is eligible to participate.”

Participants have to submit a written comprehensive or bespoke financial plan prepared and implemented by them for a client. The best financial plan wins the award based on stringent criteria. The judges use a plan evaluation scoring rubric to select the top competitors. This scoring rubric checks for more than 20 different aspects that should be included in a financial plan.

Here are the winners from other regions:

### Americas Region

- Winner – Jason Pereira, IPC/Woodgate Financial, Toronto, ON, Canada
- 1st Runner Up – Paul Tyers, Wealth Stewards, Toronto, ON, Canada
- 2nd Runner Up – Jeff Riley, Partners in Wealth, Houston, TX, USA

### Europe Region

- Winner – Crystal Bobir, Tupicoffs Pty Ltd, Brisbane, Australia
- 1st Runner Up – Paul Greenwood, WealthSpan, Melbourne, Australia
- 2nd Runner Up – Natalia Smirnova of Personal Advisor Ltd., Moscow, Russia and Mark O’Flynn of Tupicoffs Pty Ltd, Brisbane, Australia

**Source:** [www.morningstar.in](http://www.morningstar.in)