

**Recognition of Prior Learning Pre-Qualification**

Provide as much detail as possible to assist us in evaluating your experience and knowledge. \* **Complete ALL sections.**  
**If any areas are not applicable, insert N/A to acknowledge that field.**

<b>Full legal name *</b>	<b>Phone *</b>
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**Current Position \***

<input type="checkbox"/> <b>Consumer Lender</b>		
<input type="checkbox"/> Bank Manager	<input type="checkbox"/> Private Banker	<input type="checkbox"/> Personal Banker
<input type="checkbox"/> Business Banker	<input type="checkbox"/> Lending Manager	<input type="checkbox"/> Mobile Lending Manager
<input type="checkbox"/> Business Development Manager	<input type="checkbox"/> Finance/Mortgage Broker	<input type="checkbox"/> Non-bank Mortgage Lenders
<input type="checkbox"/> <b>Non-Consumer Lender</b>		
<input type="checkbox"/> Commercial finance brokers, e.g. commercial loans through banks	<input type="checkbox"/> Commercial lenders	<input type="checkbox"/> Non-bank Commercial Lenders
	<input type="checkbox"/> Any finance brokers that do not operate under NCCP Act	

**Broker/Lenders – Loan types you have completed \***

Non-Complex NCCP Lending	Complex Lending
<input type="checkbox"/> PAYG/Sole Trader (individual)	<input type="checkbox"/> Business/Commercial <input type="checkbox"/> Self-employed (with financials)
<input type="checkbox"/> Asset (car)	<input type="checkbox"/> Trusts <input type="checkbox"/> SMSF
<input type="checkbox"/> Mortgage <input type="checkbox"/> Debt Consolidation	<input type="checkbox"/> Equipment Finance <input type="checkbox"/> Other:

**Current Position Details \***

<b>Name of current business</b>					
<b>Business website URL</b>					
<b>Current job role title</b>	<b>Time in position</b>	Years:		Months:	
<b>Job role description</b> (If you have a job role description from your company, please upload this as well)					

Select all that apply:

- I perform the initial interview, including the gathering of personal information and the clients loan requirements.  
 I offer product recommendations to clients.     I submit loans to lender/s for a decision/approval.  
 I assist clients with settling their loan.

**Previous Position Details (only provide if in your current role less than 2 years)**

<b>Previous job role title</b>	<b>Time in position</b>	Years:		Months:	
<b>Previous job role description</b> (If you have a job role description from your previous employment, please upload this as well)					

Select all that apply:

- I performed the initial interview, including the gathering of personal information and the clients loan requirements.  
 I offered product recommendations to clients.     I submitted loans to lender/s for a decision/approval.  
 I assisted clients with settling their loan.

**Financial Services Industry (FNS) History \***
**List any relevant qualifications, memberships and certifications**

(Provide a Cert IV statement of attainment with this application if applying for Diploma level RPL)

**Type (copy/paste) the URL hyperlink of your professional LinkedIn profile. Do NOT insert a screenshot.**

 For example: <https://www.linkedin.com/in/jeff-mazzini-8bb2b315>
**Professional Development Evidence**

- |   |  |
|---|--|
| • I have completed a minimum of 20 hours of professional development in the last 12 months.   | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| • I can provide a statement outlining my PD activities over the last 12 months.   | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| • I have recently managed the professional development of at least two other staff members and can provide a qualified third party to attest to this. | Yes <input type="checkbox"/> No <input type="checkbox"/> |

**Professional Relationships Evidence**

- |  |  |
|--|--|
| • I can provide testimonials from two professionals with whom I have built business relationships - one from a financial services professional and one from a third-party referrer (i.e. accountant, financial planner, builder, agent). Note: These relationships do not need to be paid referrers. | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| • I am able to provide third party statements from a qualified person who has known me professionally for the past two years, and who can attest to my knowledge and experience.   | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| • I actively prospect for new clients from my own database and externally.   | Yes <input type="checkbox"/> No <input type="checkbox"/> |