

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.

Full legal name *	Phone *
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Current Position *		
<input type="checkbox"/> Consumer Lender		
<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"/> Non-Consumer Lender		
<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 *				
Name of current business				
Business website URL				
Current job role title	Time in position	Years:		Months:
Job role description (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)				
Previous job role title	Time in position	Years:		Months:
Previous job role description (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 Upgrade 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	
<ul style="list-style-type: none"> I have completed a minimum of 20 hours of professional development in the last 12 months. 	Yes <input type="checkbox"/> No <input type="checkbox"/>
<ul style="list-style-type: none"> I can provide a statement outlining my PD activities over the last 12 months. 	Yes <input type="checkbox"/> No <input type="checkbox"/>
<ul style="list-style-type: none"> 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	
<ul style="list-style-type: none"> 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"/>
<ul style="list-style-type: none"> 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"/>
<ul style="list-style-type: none"> I actively prospect for new clients from my own database and externally. 	Yes <input type="checkbox"/> No <input type="checkbox"/>