

Continuing Professional Development Accreditation Application Form

(Please either print and fax this document or send to the address on the website)

SECTION 1 – Contact details and program information

Contact Name: _____

Job Title: _____

Company: _____

FBAA Member No: _____

Address: _____

Phone: _____ Fax: _____

Email: _____

Title of Program: _____

Accreditation Type: _____ (see Section 5)

Application Date: _____

Length of CPD Activity: _____

Number of CPD points requested: _____

Presenters: _____

SECTION 2 – Accreditation Requirements Checklist

- Please refer to the FBAA CPD Accreditation Guidelines, now on FBAA website www.financebrokers.com.au (Click on Training, then CPD).
- As part of this accreditation, FBAA reserves the right to attend this training program free of charge.
- **All** sections of this form need to be completed.
- Please note that the accreditation of a training program will remain valid for 12 months only.
- Please ensure that the following are enclosed with your application. This will ensure that the accreditation process is completed within a reasonable period, and will avoid any unnecessary follow up.

(Please TICK box if 'YES')

A structured outline, agenda or timetable of the program, including duration of each session to be delivered.	<input type="checkbox"/>
A copy of the leader's guide, course notes or presentation.	<input type="checkbox"/>
A copy of the participant materials.	<input type="checkbox"/>
A copy of the course evaluation.	<input type="checkbox"/>
Copies of formal assessments (if any).	<input type="checkbox"/>
An outline of the facilitator and/or course developers qualifications & experience in the Finance Industry and/or instructional design.	<input type="checkbox"/>
Payment details or cheque.	<input type="checkbox"/>
Completed accreditation application form (this form)	<input type="checkbox"/>

SECTION 3 – Program Criteria

In order for the program to be accepted for accreditation and meet Best Practice standards it must meet the following criteria:

(Please TICK box if 'YES')

Have clearly identified aims, objectives and structure	<input type="checkbox"/>
Be developed by qualified instructional designers and subject matter experts	<input type="checkbox"/>
Be well structured and follows a logical format	<input type="checkbox"/>
Have content that is current and up-to-date	<input type="checkbox"/>
Have content that contributes to the finance/mortgage broker/intermediary's knowledge and skills	<input type="checkbox"/>
Provide course participants with course materials (where appropriate)	<input type="checkbox"/>
A course evaluation will be provided at the end of the program after which results are collated and acted upon.	<input type="checkbox"/>
Provide evidence of completion of the program to participants (including competency areas addressed)	<input type="checkbox"/>

SECTION 4 – Program Content

Please tick competency areas covered in this CPD Activity – this section must be completed before accreditation will be granted.

(Please TICK box if 'YES')

Domestic Mortgages	Types of product	
	-UCCC	<input type="checkbox"/>
	Legal environment – disclosure & compliance	<input type="checkbox"/>

(Please TICK box if 'YES')

Investment Mortgages	Types of product	<input type="checkbox"/>
	Legal environment – disclosure & compliance	<input type="checkbox"/>
Commercial and Industrial Mortgages	Types of product	<input type="checkbox"/>
	Legal environment – disclosure & compliance	<input type="checkbox"/>
Business Finance	Types of products	<input type="checkbox"/>
	Management of investment & risk	<input type="checkbox"/>
	Taxation	<input type="checkbox"/>
	Legal environment – disclosure & compliance	<input type="checkbox"/>
Chattel/Plant and Equipment	Lease, Commercial. Hire Purchase	<input type="checkbox"/>
	Legal Environment – Disclosure & Compliance	<input type="checkbox"/>
	Taxation	<input type="checkbox"/>
Debtor Finance, Factoring	Types of Products	<input type="checkbox"/>
	Invoice Purchases	<input type="checkbox"/>
	Receivable Purchases	<input type="checkbox"/>
	Taxation	<input type="checkbox"/>
	Legal Environment – disclosure & compliance	<input type="checkbox"/>
Financial Products	Types of Products • Offset accounts. Lines of credit. Reverse Mortgages	<input type="checkbox"/>
	Legal Environment • Disclosure & Compliance Taxation	<input type="checkbox"/>
	Limited FSR License and member of ASIC approved External Disputes • Resolution scheme	<input type="checkbox"/>

Generic Knowledge	The Economic Environment	<input type="checkbox"/>
	Operation of Financial Markets	<input type="checkbox"/>
	Finance Products	<input type="checkbox"/>
	Taxation Issues	<input type="checkbox"/>
	Advisory Functions Limited FSR License	<input type="checkbox"/>
	The Legal Environment & Disclosure & Compliance	<input type="checkbox"/>

(Please TICK box if 'YES')

Generic Skills	Establish relationship with client	<input type="checkbox"/>
	Identify clients objectives, needs & finance situation	<input type="checkbox"/>
	Analyse client objective, needs, finance situation & risk profile	<input type="checkbox"/>
	Develop appropriate options	<input type="checkbox"/>
	Present appropriate options to the client	<input type="checkbox"/>
	Negotiate finance options with client	<input type="checkbox"/>
	Co-ordinate implementation of agreed options	<input type="checkbox"/>
	Complete & maintain necessary documentation	<input type="checkbox"/>
	Provide on going service where requested by client	<input type="checkbox"/>
	Strategic Planning	<input type="checkbox"/>
	Practice Management	<input type="checkbox"/>

Section 5: Cost

For the purpose of administrative ease and timely completion of the assessment process, training programs received for accreditation will be categorised as below. Please ensure you provide ALL relevant documentation or an additional administration fee may be charged.

Application Fee: \$100

Accreditation Type	Activity Length	Cost (Application fee plus the following)
Seminars/Presentations/ Conventions/ Workshops/ Online	• Up to 2 hours duration	\$ TBA
	• 2 – 4 hours duration	\$ TBA
	• 4 – 8 hours duration	\$ TBA
	• 2 days	\$ TBA
	• 3 days	\$ TBA

CPD series	Videos/ magazines/ online series covering varying, relevant topics in a series format, ie monthly/bi-monthly	\$ TBA
Tertiary Courses in Financial Planning		\$ TBA

* Prices are GST inclusive.

Cost Due \$ _____

Payment Method: Cheque/Money Order American Express Visa Mastercard Diners

Card No: _____

Expiry Date: ____/____

Cardholder Signature: _____

Please mail to:

CPD Officer
 Finance Brokers Association of Australia Limited
 PO Box 272
 ALBION B.C. Qld 4010

Phone (07) 3252 0120
 Facsimile (07) 3252 0140

