



The Australian Institute of Professional Brokers ACN 134 551 376.

Applicants for Class A membership, please answer:

1. I am an Australian citizen, a permanent Australian resident or an Entity registered with ASIC.	Yes <input type="checkbox"/> No <input type="checkbox"/>
2. I hold professional indemnity insurance and am aware the Directors of AIPB may request a copy of the certificate of currency to evidence this.	Yes <input type="checkbox"/> No <input type="checkbox"/>
3. I am a member of an external dispute resolution scheme approved by the Australian Securities and Investment Commission. If, yes, please provide name	Yes <input type="checkbox"/> No <input type="checkbox"/> COSL <input type="checkbox"/> FOS <input type="checkbox"/> Other: _____
4. I understand that the Directors may request a police record and/or conduct a credit check and/or ASIC Search in assessing my eligibility for membership.	Yes <input type="checkbox"/> No <input type="checkbox"/>
5. I am committed to undertaking continuous professional development to maintain my industry knowledge and skills and understand the Directors may request evidence of this from time to time.	Yes <input type="checkbox"/> No <input type="checkbox"/>
6. I am willing to attend networking functions organised by the Australian Institute of Professional Brokers.	Yes <input type="checkbox"/> No <input type="checkbox"/>
7. I am not bankrupt, and I have not taken advantage of part X of the <i>Bankruptcy Act 1966</i> (Commonwealth).	Yes <input type="checkbox"/> No <input type="checkbox"/>
8. I do not have any convictions for offences involving fraud or dishonesty and I do not have any pending charges involving fraud or dishonesty.	Yes <input type="checkbox"/> No <input type="checkbox"/>
9. I request that if membership application is successful the AIPB lists the member business name and contact information on the website www.aipb.com.au for public viewing	Yes <input type="checkbox"/> No <input type="checkbox"/>
10. I am a member of: <ul style="list-style-type: none"> • The Mortgage & Finance Association of Australia (MFAA) • The Finance Brokers Association of Australia Ltd (FBAA) <p><i>[Note: Membership of the MFAA or the FBAA is not a prerequisite to membership of Australian Institute of Professional Brokers Ltd.]</i></p>	Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/>
11. I have completed AML/CTF credit provider required training.	Yes <input type="checkbox"/> No <input type="checkbox"/>



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Applicants for Class A membership please answer the following questions:

1. What is your area of expertise?

Experience Category	Years	***Lenders	#Accreditations	***Major Banks
<input type="checkbox"/> Consumer Loans				
<input type="checkbox"/> Residential Mortgages <input type="checkbox"/> Commercial Mortgages				
<input type="checkbox"/> Asset Finance				
<input type="checkbox"/> Commercial & Business Finance S/ M/E's				
<input type="checkbox"/> Big Business Finance				

***Number utilised in last 12 months

2. Do you have a loan writing background? If yes please provide details.

3. What formal qualifications do you hold?

4. If none, describe your broker experience.

5. Number of years Loan Writing ____ Number of years in Finance Services Industry ____

6. Check list for membership application – **Class A**

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1. Completed and signed application form	
2. Evidence of representative nominee status as Owner Partner /Director / Management of the Business	
3. A certified copy of Photo I.D. for applicant or nominated representative*	
4. A certified copy of Certificate of Incorporation if applicable*	
5. A certified copy of MFAA or FBAA current membership certificate*	
6. A certified copy of any educational qualifications*	



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* Supporting documents provided with this application are required to be witnessed by an independent party. A list of qualified witnesses are listed at:

http://www.ag.gov.au/www/agd/agd.nsf/Page/Statutorydeclaration_Statutorydeclarationsignatorylist

Please forward your completed application to:

Australian Institute of Professional Brokers
Suite 35, 431 St. Kilda Road
MELBOURNE VIC 3004

Fax: +61 (3) 9866 2977

E: info@aipb.com.au

Subscription Fee Payable in Advance

Payment of \$300.00 (including \$27.27 GST) will be made by:

Cheque Money Order Credit Card

Credit card authorization

Please charge my credit card with \$300.00

Visa MasterCard

Card Number

Expiry Date

Card Verification Number (From back of card)

Card Holder Name :	
Cardholder Signature:	



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Applicants for Class B membership, please answer:

1. I am an Australian citizen, a permanent Australian resident	Yes <input type="checkbox"/> No <input type="checkbox"/>
2. I am an Entity registered with ASIC	Yes <input type="checkbox"/> No <input type="checkbox"/>
3. I understand that the Directors may request a police record and/or conduct a credit check and/or ASIC Search in assessing my eligibility for membership.	Yes <input type="checkbox"/> No <input type="checkbox"/>
4. I am a member of an external dispute resolution scheme approved by the Australian Securities and Investment Commission if applicable.	YES <input type="checkbox"/> NO <input type="checkbox"/>
5. Name of scheme (if applicable)	_____
6. I am willing to attend networking functions organised by the Australian Institute of Professional Brokers.	Yes <input type="checkbox"/> No <input type="checkbox"/>
7. I am not bankrupt, and I have not taken advantage of part X of the <i>Bankruptcy Act 1966</i> (Commonwealth).	Yes <input type="checkbox"/> No <input type="checkbox"/>
8. I do not have any convictions for offences involving fraud or dishonesty and I do not have any pending charges involving fraud or dishonesty.	Yes <input type="checkbox"/> No <input type="checkbox"/>
9. I request that if membership application is successful the AIPB lists the member business name and contact information on the website www.aipb.com.au for public viewing	Yes <input type="checkbox"/> No <input type="checkbox"/>
10. This application for membership is to contribute to and support the following objectives <ul style="list-style-type: none"> To advance the professional image and functioning of the Finance Broker To ensure Finance Brokers are recognised and acknowledged as a valuable commodity to borrowers, credit providers, government, regulators, and the Australian public 	Yes <input type="checkbox"/> No <input type="checkbox"/>

Check list for membership application – **Class B**

√

1. Completed and signed application form	
2. Evidence of representative nominee status as Owner Partner /Director / Management of the Business	
3. A certified copy of Photo I.D. for applicant or nominated representative*	
4. A certified copy of Certificate of Incorporation if applicable*	

* Supporting documents provided with this application are required to be witnessed by an independent party. A list of qualified witnesses are listed at:

http://www.ag.gov.au/www/agd/agd.nsf/Page/Statutorydeclaration_Statutorydeclarationsignatorylist



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Subscription Fee Payable in Advance

Payment of \$300.00 (including \$27.27 GST) will be made by:

Cheque Money Order Credit Card

Credit card authorization

Please charge my credit card with \$300.00

Visa MasterCard

Card Number

Expiry Date

Card Verification Number (From back of card)

Card Holder Name :	
Cardholder Signature:	



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Privacy Disclosure Statement and Consents

I acknowledge that any personal information collected by the Australian Institute of Professional Brokers including any supporting documentation I have provided to the Australian Institute of Professional Brokers for the purposes of this membership application and including related purposes:

- the Australian Institute of Professional Brokers may not be able to process this application if this personal information is not provided;
- I authorise the Australian Institute of Professional Brokers to carry out any relevant checks as deemed necessary;
- if this application is granted, the Australian Institute of Professional Brokers may publish my personal information with my Australian Institute of Professional Brokers member contact details in public lists of Australian Institute of Professional Brokers members and in Australian Institute of Professional Brokers publications;
- this personal information may be used by the Australian Institute of Professional Brokers Board, staff and consultants engaged by the Australian Institute of Professional Brokers to administer the Association;
- all statements made by me in relation to this application can be investigated by the Australian Institute of Professional Brokers or persons authorised by the Australian Institute of Professional Brokers;
- The Australian Institute of Professional Brokers may disclose my personal information to other businesses in accordance with the Australian Institute of Professional Brokers Constitution, Code of Practice and/or Disciplinary Rules. These other businesses may include, but are not limited to: the Australian Securities and Investments Commission (ASIC), an External Dispute Resolution scheme (EDR), lawyers, accountants, printers, mailing houses and, others who may assist the Australian Institute of Professional Brokers from time to time and /or as required by law.

I consent to the collection and use of my personal information for the purposes described above.

I acknowledge that I can gain access to this information from the Australian Institute of Professional Brokers at Suite 35, 431 St. Kilda Road Melbourne Vic 3004.

Signature of Applicant:	
Date:	

Please provide any further information that you feel is relevant or for general comments you would like to contribute.
