

Ph: 1300736676 Fax: 1300736656

Email: info@vipcashflow.com.au

Financial Planner Advance Application Form

Thank you for applying for a Financial Planner Commission/Trail How you get your Advance is quick and easy.

Step 1: Complete an Application Form

If this is the first time you have used VIP Cashflow, you will need to complete an application form. Please fill it out and sign the application and fax it back to us with a copy of the following documents:

- * Copy of Your Drivers license
- * Copy of Your Medicare Card
- * Copy of Your membership to FPA or other body
- * Copy of Statement of Commission
- * Copy of the most recent Mortgage Trail Book statement from your AFSL provider (applies if you are applying for advancing on an existing Trail)

You can submit your application form by email (info@vipcashflow.com.au) or fax to us on 1300736656.

Step 2: Review and Acceptance

Once we have received your application we review it and approve it (subject to it meeting our guidelines). At this moment we will conduct a Personal, Company Check. We will then send you an Agreement where the terms and agreed settlement date are listed. Simply sign this and fax or email back

Step 3: Money in your Account

Once we have received the Commission Advance Agreement, we will then deposit Commission directly into your account, less the relevant interest and fees owing to VIP Cashflow

For Any questions you can contact us on 1300736676

You're Details

First name		Last name	
Middle Name			
First Name (joint Applicant) Middle Name		Last Name (Joint Applicant)	
date of birth Applicant one		Drivers license # Applicant one	
Date of Birth Applicant two		Drivers license # Applicant two	
Home address			
suburb		state	

postcode		Tel mobile: App: 1 & 2	
Employer Name:		Employer Address:	
Tel office:		Tel home:	
Primary email add:			
Secondary email add:			
are you trading as a company or trust?	<input type="checkbox"/> Yes <input type="checkbox"/> No	are you a director?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Company			
Registered Address		Suburb	

Bank Account Details

Account Name	
BSB Number	
Account Number	

Your Financial Planner Information

Mortgage Broker Name			
Principal in charge			
- email address			
Sales manager			
- email address			
Payroll /Office administrator			
- email address			
Office address			
Suburb		State	
Postcode		Telephone	
Office email address			
Facsimile Number			

Details of Commission to be assigned

If you are **applying as an Owner of a Financial Planning firm**, you only need to provide the Broker's net share of commission in Section 1. You can leave Section 2 blank. If you are **applying as an Individual Financial Planner** you need to provide all details in Section 1 and 2.

Section 1

Total amount of commission (ex GST)	\$	Your total share of commission	\$
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To be deducted by Financial Planning Company (if Relevant)

Section 2

Wages	\$	Allowances (eg travel phone)	\$
Desk fees	\$	Previous commission advances by Planner	\$
Direct debits	\$	other	\$
Your share of the commission after the above deductions			\$
Tax to be deducted by the Owner/Broker			\$
Your total net share of the commission to be assigned			\$
No other person is entitled to my share of the commission			() tick

Privacy Statement

Important Notice To Applicant(s) For Credit (Section 18(E)(1) Privacy Act 1988)

Notice of disclosure of your credit information to a credit-reporting agency. (Privacy Act 1988)

VIP Cashflow may give information about you to a credit reporting agency, for the following purposes:

- * to obtain a consumer credit report about you, and/or
- * to allow the credit reporting agency to create or maintain a credit information file containing information about you.

If after reasonable follow up, monies owed by you to VIP Cashflow remain outstanding, we may supply relevant personal information and details of the monies owed to a credit reporting agency. This may include but is not limited to:

- That we are a credit provider to you.
- Advice about payments overdue and which are in collection that we are permitted to report.
- That cheques drawn by you or direct debit requests to your account have been dishonoured.
- That credit provided to you has been paid or otherwise discharged.

STATEMENT BY APPLICANT(S) FOR CREDIT

Please read carefully before signing. Where there is more than one applicant, each applicant must sign.

1. Giving information to a Credit Reporting Agency (Section 18E(8)(c) Privacy Act 1988)

VIP Cashflow has informed me that it may give certain personal information about me to a credit-reporting agency.

2. Access to Commercial Credit Information (Section 18L(4) Privacy Act 1988)

I/we agree that VIP Cashflow may obtain information about me/us from a business, which provides information about the commercial credit worthiness of persons for the purpose of assessing my/our application for consumer credit.

3. Access to Consumer Credit Information (Section 18K(1)(b), Privacy Act 1988)

I/we agree that VIP Cashflow may obtain a consumer credit report containing information about me from a credit-reporting agency for the purpose of assessing my/our application for commercial credit.

I have read and understood the above Terms and Privacy Statement of this document.

NAME (PLEASE PRINT):

SIGNATURE:

DATE:

NAME (PLEASE PRINT):

SIGNATURE:

DATE:

DECLARATION OF PURPOSE

(as required under the National Credit Code, Subsection 13 (5) the form of the declaration is)

TO: VIP Cashflow PTY LTD

LOAN TO: _____ (NAME OF APPLICANTS)

LOAN AMOUNT: \$ _____

Each applicant declares that the credit to be provided to that applicant by the credit provider will be applied wholly or predominantly for business or investment purposes (or for both purposes).

Each applicant agrees to provide declarations of purpose of the credit whenever required by the credit provider.

IMPORTANT

You should **not** sign this declaration unless this loan is wholly or predominantly for business or investment purposes.

Investment purposes other than investment in residential property.

By signing this declaration you may **lose** your protection under the National Credit Code.

x _____ x _____
Applicant's Signature Applicant's Signature

Applicant's Name Applicant's Name

Date / / Date / /