



FPA member registration form for the FPA Pro Bono Program

This form is for use by FPA members who wish to register as an FPA pro bono financial planner.

Member details:

Name _____

Member number _____

Licensee name _____

Email _____

Phone _____

Mobile _____

Licensee details:

As an Australian Financial Services Licensee, we give authority for the above named financial planner to be included in the FPA Pro Bono Program.

Licensee name _____

Mailing address _____

Suburb _____ Post code _____

Name of officer _____

Position _____

Phone _____

Mobile _____

Email _____

Signature

Date

I wish to register to provide pro bono financial advice under the Financial Planning Association (FPA) Pro Bono Program and confirm that I fulfill the following requirements to be included in the Program:

- I am a CERTIFIED FINANCIAL PLANNER® professional OR
- I am a Financial Planner AFP® member OR
- I am enrolled in the CFP® Certification Program



FPA member registration form for the FPA Pro Bono Program

- I agree to provide pro bono financial advice taking account of all ethical, professional and regulatory requirements that apply to personal financial advice
- I confirm that I have the agreement of my AFS licensee to provide pro bono advice under the FPA Pro Bono Program

I have the qualifications and experience to enable me to offer personal financial advice in the following areas:

Insurance

- Life insurance
- Trauma insurance
- Income Protection

Income streams

- Annuities
- Government pensions
- Allocated pensions
- TAPs
- Account-based pension

Investment

- Directed shares
- Managed investments

- Retirement planning
- Succession planning
- Other (please specify)

Superannuation

- Industry funds
- Retail funds
- Self-Managed Super Funds

Old Policies

- Whole of Life policies
- Endowment policies
- Bonds

I am prepared to visit pro bono clients with the following geographic radius of my location:

Location	Radius	State
Financial planner		
Signature		Date

Return completed form

By mail: FPA Pro Bono Program, GPO Box 4285, Sydney NSW 2001	By fax: 02 9220 4580	By email: communications@fpa.asn.au
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