



Client application to request pro bono financial advice

FPA Pro Bono Program

This form is for use by clients who wish to apply for pro bono advice.

Applicant details:

Name		

D.O.B		

Address		

Suburb	State	Postcode
_____	_____	_____
Email		

Phone		
Home	Business	Mobile
_____	_____	_____

Personal circumstances: Briefly state your reasons for seeking pro bono financial advice, including the outcome you are seeking. Please provide details that will assist in our assessment of your request and enable us to identify suitable planners to advise you.



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Please indicate the areas in which you are seeking advice (if known):

Insurance

- Life insurance
- Trauma insurance
- Income protection
- Whole of Life policies
- Endowment policies

Investment

- Direct shares
- Managed investments
- Bonds

Income streams in retirement

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

Superannuation

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

- Succession planning
- Retirement planning
- Strategy
- Budgeting
- Mortgage
- Debt management
- Other _____
- Unsure

Declaration:

I / We the applicant/s acknowledge the following:

- The FPA Pro Bono Program does not represent applicants but only acts as a referral service between the public and professional financial planners.
- I / We have no right of action against the Financial Planning Association of Australia (FPA) or its employees in any event arising from this application or any assistance obtained from a financial planner referred via the program.
- I / We recognise that the decision regarding the eligibility for pro bono financial advice will be made by the individual adviser, not by the FPA.
- It may not be possible to find a financial planner willing to advise you on the basis requested or in the location concerned.
- I / We have the right to request access to information held by the Program which relates to me / us.

Print name(s) _____

Signature of
Applicant 1 _____

Signature of
Applicant 2 _____

Date _____

Date _____

Application submission

By mail: FPA Pro Bono Program,
GPO Box 4285, Sydney NSW 2001

By fax: 02 9220 4580

By email:
communications@fpa.asn.au