



We wish to apply for accreditation as: (please tick one box only – *refer notes* on page 4)

- Power Super Mortgage Broker (you must have PI for mortgage broking)
- Power Super Accredited Adviser (you must be a financial planner or accountant)

Company Name			
ACN		Date of Incorporation	
ABN			
Business Trading name			
Registered Address			
Trading Address			
Phone			
Fax			
E-Mail/Web			

PROPRIETOR/DIRECTOR 1

Surname			
Other Names			
Date of Birth			
Current home address			
Home Phone		Mobile	
E-mail address			

PROPRIETOR/DIRECTOR 2 (if more than two Directors, please add extra pages)

Surname			
Other Names			
Date of Birth			
Current home address			
Home Phone		Mobile	
E-mail address			

KEY PERSONNEL

Name			
Position		Phone	
Email			
Name			
Position		Phone	
Email			



BACKGROUND OF BUSINESS – For Financial Planners and Accountants

Principal Trading Activity		
Other Trading activities		
Branch locations		
Number of years in business		
Number of advising staff (with RG 146 qualifications)		
Number of degree qualified accountants		
Anticipated Business	applications per month	
Industry Memberships (please attach confirmation, if applicable)	<input type="checkbox"/> CA membership number:	
	<input type="checkbox"/> CPA membership number:	
	<input type="checkbox"/> NIA Number:	
	<input type="checkbox"/> FPA membership number:	
	<input type="checkbox"/> AFA membership number:	
	<input type="checkbox"/> Other membership name & number:	

	Yes	No
Have you, or any of your partners or directors, even been a shareholder or officer of any company to which a manager, receiver, and/or liquidator has been appointed?		
Is there any unsatisfied judgment entered in any court against you, or any of your partners or directors, or any company of which either you, or any of your partners or directors are or were a shareholder or officer?		
Has any lending institution ever suspended or withdrawn your firm's/company's accreditation to conduct business with it?		

(If YES to any of the above, we respectfully ask for a separate sheet setting out the particulars, please)

PLEASE ATTACH THE FOLLOWING SUPPORTING DOCUMENTS:

1. A certificate of currency (or a letter from a licensed insurance broker) confirming you have PI insurance for cover of at least \$1 million. This must be current, and reflect your activity in accounting or financial planning.
2. A copy of Industry Association Membership Certificate.
3. Please authorise the attached privacy form or alternatively you may attach your own copy of the CRAA. This is required for each director.



BACKGROUND OF BUSINESS – For Mortgage Brokers Only

Principal Trading Activity		
Other Trading activities		
Branch locations		
Number of years in business		
Number of loan writing staff		
Number of support staff		
Typical volume (per month)		
Main products		
Main Funder		
Other Funders utilised		
Anticipated Business	\$ _____ settlements per month	
Industry Memberships (please attach confirmation, if applicable)	<input type="checkbox"/> MFAA membership number:	
	<input type="checkbox"/> FBAA membership number:	
	<input type="checkbox"/> AMC Number:	
	<input type="checkbox"/> Other membership number:	

	Yes	No
Have you, or any of your partners or directors, even been a shareholder or officer of any company to which a manager, receiver, and/or liquidator has been appointed?		
Is there any unsatisfied judgment entered in any court against you, or any of your partners or directors, or any company of which either you, or any of your partners or directors are or were a shareholder or officer?		
Has any lending institution ever suspended or withdrawn your firm's/company's accreditation to conduct business with it?		

(If YES to any of the above, we respectfully ask for a separate sheet setting out the particulars, please)

PLEASE ATTACH THE FOLLOWING SUPPORTING DOCUMENTS:

1. A certificate of currency confirming you have at least \$1 million. This must be current, and reflect your activity in mortgage sales.
2. A copy of COSL/Financial Ombudsman Membership Certificate.
3. If a member of either MFAA or FBAA, please attach Membership Certificate.
4. If **not** a member of either MFAA or FBAA, please provide Police Report for all Directors (report to be no more than 6 months old).
5. Please authorise the attached privacy form or alternatively you may attach your own copy of the CRAA (if acquired within the last 3 months). This is required for each director.
6. A copy of your Certificate of Registration (ACT & WA only)
7. 100 points of certified identification for all Directors.
8. Evidence of satisfactory completion of a course in AML by an accredited provider.



PowerSuper

Application For Accreditation as a PowerSuper Warrant Introducer

Notes:

To be our accredited **mortgage broker** you need to demonstrate membership with an appropriate industry body, PI cover for mortgage broking of a minimum \$1m and registration (depending on your state). You will be remunerated from any successful **loan applications**.

To be our **accredited adviser** you need to be a licensed financial planner authorised to advise on superannuation and have PI Cover, or demonstrate membership of an acceptable accounting body with PI cover for public accounting. In either case we reserve the right to assess your knowledge on SMSF's or require you to undertake an on-line examination on SMSF's. You will be remunerated from a share of the **establishment fee**.

Bank account into which your fees/commissions are to be paid:

Bank	
BSB/Account No.	
Account Name	
Email address for statements	

We hereby apply for accreditation with Power Super (Australia) Pty Ltd

.....
Principal/Director 1 (please sign)

.....
Principal/Director 2 (please sign)

.....
Principal/Director 1 (please print name)

.....
Principal/Director 2 (please print name)

Date:

Date:

PLEASE NOTE: Individual Broker Loan Writer Accreditation

We ask for your assistance in establishing the credentials of all individual Loan Writers working within your business.

In many cases, Loan Writers will already hold either MFAA or FBAA accreditation, and in such cases we ask that you provide either an MFAA AMC Certificate or FBAA Certificate of Attainment.



PRIVACY ACT AUTHORITY

Privacy Act of 1988

I/We acknowledge that in accordance with s.18E(8)(c) of the Privacy Act 1988, certain items of personal information about me/us contained in this application and permitted to be kept on a credit information file, might be disclosed to a credit reporting agency.

Authority to exchange information with other credit providers

In accordance with section 18N(1)(b) of the Privacy Act, I/we authorise Power Super (Australia) Pty Limited, Firstfolio Wholesale Pty Limited and related companies to give and obtain from credit providers named in this credit application, and credit providers that may be named in a credit report issued by a credit reporting agency, information about my/our credit arrangements. I/We understand this information can include any information about my/our credit worthiness, credit standing, credit history or credit capacity that credit providers are allowed to give or receive from each other under the Privacy Act 1988.

I/We understand that information may be used for the following purposes:

- To assess an application by me/us for credit
- To assess my/our credit worthiness
- To assist me/us avoid defaulting on my/our credit obligations
- To notify other credit providers of a default by me/us

If the proposed lender considers it relevant to assess my/our application for personal credit, I/we agree to the proposed lender obtaining a report about my/our commercial activities or commercial credit worthiness from a business that provides information about the commercial credit worthiness of persons.

If the proposed lender considers it relevant to assessing my/our application for commercial credit, I/we agree to the proposed lender obtaining from a credit reporting agency a credit report containing personal credit information about me/us in relation to commercial credit provided by the proposed lender

.....

Principal/Director 1 (please sign)

.....

Principal/Director 2 (please sign)

.....

Principal/Director 1 (please print name)

.....

Principal/Director 2 (please print name)

Date:

Date:

PLEASE SEND COMPLETED APPLICATIONS TO:	
POWER SUPER	or Email: selias@powersuper.com.au
19/7 Narabang Way	
Belrose NSW 2085	