

# CLIENT REGISTRATION FORM\*

AGENT NAME	MISS / MR.	DATE	CLIENT NO.
<input type="text"/>	<input type="text"/>	<input type="text" value="month / day / year"/>	<input type="text"/>
SURNAME	FIRST NAME	DATE OF BIRTH	SEX
<input type="text"/>	<input type="text"/>	<input type="text" value="month / day / year"/>	<input type="checkbox"/> M <input type="checkbox"/> F
NATIONALITY	COUNTRY OF BIRTH	PASSPORT NO.	MARITAL STATUS
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
TELEPHONE NO.	MOBILE NO.	WORK NO.	
<input type="text" value="(country code) (area code)"/>	<input type="text" value="(country code) (area code)"/>	<input type="text" value="(country code) (area code)"/>	
FAX NO.	E-MAIL ADDRESS		
<input type="text"/>	<input type="text"/>		
OVERSEAS ADDRESS	AUSTRALIAN ADDRESS		
<input type="text" value="(postal code)"/>	<input type="text" value="(postal code)"/>		

## SERVICES REQUIRED ( PLEASE TICK )

### EDUCATION - REFER TO CHECKLIST "A" OVERLEAF

- |   |  |   |   |
|---|--|---|---|
| <input type="checkbox"/> School Application     | <input type="checkbox"/> Guardianship Service        | <input type="checkbox"/> Student Visa Renewal | <input type="checkbox"/> MRT                |
| <input type="checkbox"/> Accommodation Required | <input type="checkbox"/> OSHC (Oversea Health Cover) | <input type="checkbox"/> Skilled Migration    | <input type="checkbox"/> Ministerial Matter |
| <input type="checkbox"/> Airport Pick Up        | <input type="checkbox"/> Changing Education Provider | <input type="checkbox"/> 28 Days Explanation  | <input type="checkbox"/> OTHERS             |

### ASSET MANAGEMENT - REFER TO CHECKLIST "B" ON THE BACK

- |   |  |   |                                 |
|---|--|---|---------------------------------|
| <input type="checkbox"/> International Mortgage Service | <input type="checkbox"/> Domestic Mortgage | <input type="checkbox"/> Financial Planning   | <input type="checkbox"/> OTHERS |
| <input type="checkbox"/> New Purchase                   | <input type="checkbox"/> Accounting        | <input type="checkbox"/> Property Enquiry     |                                 |
| <input type="checkbox"/> IMS Refinancing                | <input type="checkbox"/> Wealth Management | <input type="checkbox"/> Business Consultancy |                                 |

### LEGAL SERVICES

- |                                     |  |  |                                 |
|-------------------------------------|--|--|---------------------------------|
| <input type="checkbox"/> Migration  | <input type="checkbox"/> Guardian Required | <input type="checkbox"/> Criminal              | <input type="checkbox"/> OTHERS |
| <input type="checkbox"/> Commercial | <input type="checkbox"/> Administrative    | <input type="checkbox"/> Personal Injury       |                                 |
| <input type="checkbox"/> Family     | <input type="checkbox"/> Civil Litigation  | <input type="checkbox"/> Intellectual Property |                                 |

# CHECKLIST “A”

N.B. All Documents above need to be certified copies or originals.

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Application / Enrolment Fee          | <input type="checkbox"/> Australian Qualifications / Transcripts | <input type="checkbox"/> Letters of Recommendation                                    |
| <input type="checkbox"/> Passport & Visa                      | <input type="checkbox"/> School Application                      | <input type="checkbox"/> Personal Statement /<br>Study Plan /<br>Statement of Purpose |
| <input type="checkbox"/> Contact Details (Overseas)           | <input type="checkbox"/> English Level - IELTS & TOFEL           | <input type="checkbox"/> Trade Assessment Results                                     |
| <input type="checkbox"/> Contact Details (Australia)          | <input type="checkbox"/> Overseas Qualifications / Transcripts   | <input type="checkbox"/> Bank Statements  |
| <input type="checkbox"/> Resume / CV                          | <input type="checkbox"/> Correspondence Letters from DIMIA       | <input type="checkbox"/> 4x Passport Photos<br>(signed on reverse)                    |
| <input type="checkbox"/> Work Experience History              | <input type="checkbox"/> Current school details                  | <input type="checkbox"/> Birth Certificate  |
| <input type="checkbox"/> Portfolio of previous works          | <input type="checkbox"/> Other Application Forms Required        | <input type="checkbox"/> Tuition Fees   |
| <input type="checkbox"/> Guardian Contact Details (Australia) | <input type="checkbox"/> Previous Applications                   |   |

# CHECKLIST “B”

## Identification

- Certified, clear, black and white copy of valid ID/Passport(s)
- Confirmation of address e.g. utility bill/tax assessment/bank or credit card statement (these must be within 3 months of date of issue)

## Income and Assets

- Proof of gross and net income e.g. copy of latest 2 years' tax returns/assessments. Latest salary advice, employment contract or confirmation letter, etc
- Latest month's deposit valuation
- Latest 3 month's bank statements
- Proof of last 2 years' bonuses e.g. pay slips, letter from company, bank statements, etc
- Latest month's investment/portfolio valuation
- Proof of deposit down payment for the purchase of new property

## Self Employed

- Latest 2 years' audited financial statements
- Access details of the property (address & contact telephone number)
- Property and Legal Information
- A copy of the sale and purchase agreement (for new purchase)
- Name, address and contact details of legal representation acting on your behalf.
- A copy of your tenancy agreement (if applicable)

## Refinancing case

- Latest 6 months' mortgage statements
- A copy of current building insurance policy
- A copy of latest tenancy agreement for refinancing