

Money Mentors

Appt date: _____

MANDURAH / BYFORD FINANCIAL COUNSELLING SERVICE

Welcome to Money Mentors Financial Counselling Services. We look forward to working with you.

This paperwork can also be completed and/or downloaded online at <http://www.moneymentors.org.au/contact/> Links located in bottom left corner. Accessible via computer, tablet, or phone.

Section 1

1.1 Personal Information – General

First Name:.....Middle Name: Last Name:

DOB:...../...../..... Gender: Male Female Diverse gender identity

Address:.....

Email:.....Contact No:.....

Partner: YES/NO If Attending with your partner- Please Complete a Client Partner Details Form

Partner Details:

First Name:.....Middle Name: Last Name:

DOB:...../...../.....

Email:.....Contact No:.....

1.2 Have you and/or your partner/spouse visited Money Mentors previously? YES / NO

1.3 Are you aware that any person with whom you may have a personal (eg: a relationship break-up) or legal issue with, is attending our services: YES / NO

1.4 Are you currently appointed as any of the following:

- Community Treatment Order
- Guardian

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- Public Trustee
- Centrelink Money Management Voluntary
- Centrelink Money Management Involuntary

1.5 Are there any adults over 18 living in the house? YES / NO

If yes and you are applying for debts related to household expenses such as gas, electricity, water or rent - you must complete details of other Adults living in the house.

Other Adults (over 18) Living in the House – complete this section if you answered Yes to above		
Name:	DOB	Relationship to Applicant
Name:	DOB	Relationship to Applicant
Name:	DOB	Relationship to Applicant

1.6 Are there any children under 18 years of age living at this address? YES / NO

Name:.....DOB:...../...../.....

Name:.....DOB:...../...../.....

Name:.....DOB:...../...../.....

1.7 How did you find out about our services?

1.8 Would you like to participate in a survey regarding our services? YES / NO

SECTION 2: Please tick (✓) one answer for each question

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2.1 Family Composition			
Couple family with no children		Grandparent family	
Couple family with children		Single person	
One parent family with children		Other family	
Not stated or inadequately described			

2.2 Aboriginal status
Aboriginal <input type="checkbox"/> Torres Strait Islander <input type="checkbox"/> Both Aboriginal and Torres Strait Islander <input type="checkbox"/> Neither Aboriginal nor Torres Strait Islander <input type="checkbox"/>

2.3 Country of birth
Australia <input type="checkbox"/> English-speaking country* <input type="checkbox"/> Other country <input type="checkbox"/> Please indicate country of origin *UK, NZ, USA, Ireland, Canada, or South Africa

2.4 Main Language Spoken at Home	English <input type="checkbox"/>	Other Language <input type="checkbox"/>
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2.5 Disability	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Mental Health	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If yes, details		

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2.6 Main source of income			
Disability Support Pension			
New Start			
Other government payment or benefit			
Paid employment (casual, full-time, part-time, self-employed)			
Compensation payments			
Other income (e.g., superannuation, investments, overseas pension)			
Nil income			
Not stated or inadequately described			
2.7 Level of Household Income of Client (Gross)			
\$0 - \$20,000		\$100,001 - \$120,000	
\$20,001 - \$40,000		\$120,001 - \$140,000	
\$40,001 - \$60,000		\$140,001 - \$160,000	
\$60,001 - \$80,000		\$160,001+	
\$80,001 - \$100,000			

SECTION 2 Continued. Please tick (✓) one answer for each question

2.8 Labour force status			
Employed <input type="checkbox"/>	Unemployed <input type="checkbox"/>	Volunteer <input type="checkbox"/>	Retired <input type="checkbox"/>

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2.9 Housing Tenure	
Owner without mortgage	
Owner with mortgage	
Renter – private	
Renter – Housing Authority	
Community housing	
Crisis or transitional housing	
Occupier under rent free accommodation	
Boarders/Lodger	
Homeless	
Inappropriate and unstable accommodation	
Other tenure type	
Not stated or inadequately described	

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Paperwork Checklist

- 3 months of current, bank account statements. If you have online banking, this can be done during your appointment
- Latest loan account statement for each of the following requiring help: credit cards, mortgages, personal loans, Pay Day Loans, Buy now Pay Later or other debt you may have.
- Rent or Mortgage payment receipts if not on bank statement.
- 3 most current payslips (if working).
- Centrelink Income Statements (include all benefits and deductions) If you have a MyGov login, this can be done during your appointment
- Copies of Utilities bills requiring help (Synergy, Kleenheat, Water Corp or other)

If self-employed, additional required documents are;

- 3 months of current, bank transaction statements from business accounts
- 3 BAS statements if monthly or 1 BAS statement if lodged quarterly
- Profit and loss statement (if available) or last tax return

Additional Paperwork Required for Other Debts

- Proof of any other income (as listed at 2.6)
- If you are applying for Grants or Emergency relief related to household expenses such as gas, electricity, water or rent, please supply income, and bank statements for all adults in the house.

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Office Locations

MANDURAH: 61B Pinjarra Rd, MANDURAH WA 6210

Monday-Friday 9am-4pm

Ph: 9581 1281 Email: admin@moneymentors.org.au

BYFORD: St Aidan's Community Centre, 21 Clifton Street, BYFORD WA 6122

Monday-Friday 9am-4pm

Ph: 9581 1281 Email: admin@moneymentors.org.au

Outreach Locations, call 9581 1281 to book.

KWINANA (Fridays): Frank Konecny Community Centre, 2 Skottowe Pkwy, Parmelia WA 6167

WAROONA (Last Tuesday of the month): Waroona Community Resource Centre, 10 Henning St,

Waroona WA 6215

Office times are subject to change according to staff availability. If we are not available, please feel free to leave us a message on (08) 9581 1281 or email admin@moneymentors.org.au, and we will return your enquiry as soon as possible.

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FORTNIGHTLY EXPENDITURE STATEMENT			
HOUSING (Total)	\$	FOOD (Total)	\$
Rent		Groceries	
1st Mortgage		Fruit and Vegetables	
2nd Mortgage		Lunches	
Water Rates		Takeaways and eating out	
Home & Contents Insurance		EDUCATION (Total)	\$
House Repairs		School fees & Books	
Strata Levies		Uniforms	
MEDICAL (Total)	\$	Self-Education	
Medical insurance		School Excursions	
Doctor		Pre-school	
Dentist		Child Minding	
Chemist		OTHER (Total)	\$
PERSONAL (Total)	\$	Superannuation	
Grooming and Cosmetics		Life/Income insurance	
Entertainment		Professional fees	
Club Fees		Savings	
Holidays		Pets Vet Fees	
Gifts		Pet food	
Pocket money - Children		Other expenditure	
Alcoholic Drinks		TRANSPORT (Total)	\$
Cigarettes/Tobacco		Petrol	
Donations/other		Repairs	
DVD's/Videos/Movies		Registration	
Pool/Gardening		Fines	
UTILITIES (Total)	\$	Insurance	
Electricity		Licence	
Heating oil/wood		Fares	
Gas		EXTRAS (Total)	\$
Water			
Mobile Phone			
Internet/Foxtel			
Telephone			
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PO Box 1711 MANDURAH WA 6210 Phone: (08) 9581 1281 Email: admin@moneymentors.org.au			
ABN 47 354 062 117			
Subtotal	\$	Total	\$

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Loans and Debts (Add Centrelink Debts below)					
Creditors Name	Payment	Balance	Creditors name	Payment	Balance
Subtotal	\$	\$	Totals	\$	\$

FORTNIGHTLY INCOME		FORTNIGHTLY EXPENDITURE	
Your Income	\$	Living Expenses (as per page 7)	\$
Partner/Spouse Income	\$	Creditors/Loan Expenses	\$
Centrelink/Pension/Benefit	\$	TOTAL	\$
Family Payment	\$		
Child Support	\$		
Investments	\$		
		Income Total	
		Minus Expenses Total	
TOTAL	\$	FORTNIGHTLY DIFFERENCE	\$

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1. Nature of Our Service

The Money Mentors Financial Counselling service is free and confidential and assists consumers to deal with their finances in an effective way. We assist clients to manage their financial situation realistically, to identify the options open to them in their situation, and to weigh the advantages and disadvantages of those options. Our service does not provide legal, or account assistance and it does not lend money.

2. Your Responsibilities

For us to provide efficient services for you, we request that you:

- 2.1 Be respectful and considerate towards our staff and other clients. (*You may be refused assistance if you attend our service under the influence of alcohol or drugs, or your behavior is aggressive*)
- 2.2 Reply as soon as we contact you.
- 2.3 Keep us informed of any change in your address or contact details, and any major change in your financial situation.
- 2.4 Be clear and honest with the information you provide to us about your financial situation. You must give us all relevant and up to date information so we can help you in an efficient way.

3. Our responsibilities

In return for your co-operation, Money Mentors will:

- 3.1 Provide you with relevant information and options within the ability of our service, and Money Mentors will advise you when you need assistance from another service or person.
- 3.2 Treat you in a respectful, considerate, and non-discriminatory manner.

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3.3 We will keep you informed of any significant changes relevant to your situation.

4. Confidentiality

While our service maintains confidentiality of our clients and their files in all normal circumstances, it will reveal some information if it is obligated to by the law. Examples of times where it may be necessary to reveal information are, if our service is served with a Subpoena issued by a Court, or if a notice is received from a Government agency. We are also required by our management and funding

organisations to collect statistics, and report to those organisations. Our service will also disclose information for the purpose of avoiding the probable commission of a serious offence or for the purpose of preventing imminent serious physical harm to you or to another person.

5. Privacy

Our service works under the Commonwealth Privacy Act 1988.

During the time, we work with you, it may be necessary for us to collect personal information from you and pass it on to third parties such as creditors and their representatives. By signing this service agreement, you agree to us collecting, using, and passing on your personal information when it is required to provide the best service for you.

Our service has a privacy policy; if you wish to see a copy of it you can contact the management of this service.

6. Realistic Goals

While our service is happy to work with you towards your goals, it is important you understand we cannot guarantee a specific outcome for you. We ask that you respond within a reasonable time to our letters or phone calls to you. If we do not hear from you within a month, we will assume you no longer want to work with our service, and we will close your file.

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Client signature

Client name

Date

Client signature

Client name

Date