

Money Mentors

MANDURAH / BYFORD FINANCIAL COUNSELLING SERVICE

Client Partner Details

Client One Name-

Section 1

1.1 Personal Information – General

Partner Details:

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

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

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

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

2.1 Family Composition			
Couple family with no children	<input type="checkbox"/>	Grandparent family	<input type="checkbox"/>
Couple family with children	<input type="checkbox"/>	Single person	<input type="checkbox"/>
One parent family with children	<input type="checkbox"/>	Other family	<input type="checkbox"/>
Not stated or inadequately described	<input type="checkbox"/>		<input type="checkbox"/>

2.2 Aboriginal status	
Aboriginal 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	

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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		

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		
Not in labour force <input type="checkbox"/>	Unemployed <input type="checkbox"/>	Employed <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	