



# SUBMISSION FORM

## FBAA Mentee of the Year

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This is an individual award that is open to finance brokers who are being mentored and is based on the period from 1 July 2021 - 30 June 2022

### CATEGORY DESCRIPTION

This award recognises the top-performing Industry Mentee for the financial year 2021 – 2022 and is open to all Mentees who meet the category requirements. This category assesses loan settlement and loan book performance, marketing initiatives, conversion rates, submission quality and customer servicing capabilities will also be evaluated as part of this award.

To qualify for this award, entrants must have:

- A minimum 12-month industry experience.
- A business plan.
- A marketing plan.
- Reference from Mentor.

### SUBMISSION REQUIREMENTS

1. Complete an awards submission form for the category.
2. Provide full metrics; failure to provide full details may negatively impact your submission. All business metrics are strictly confidential and will not be published.
3. The entrant must submit a detailed submission that answers/address the points below. This can also be submitted in video format no longer than 5 minutes.
  - Highlight how they have structured their business and offering to service the wider financial needs of consumers.
  - Demonstrate any market specialisation plus tactics, strategies and success in driving business from that sector.
  - Highlight innovation in their business and how that has impacted business growth.
  - Provide case studies or examples that showcase how they cater for the needs of clients and how that influences business success.

### OPEN RESPONSES - Mandatory Requirement

Please complete each question in 300 words or less (word counts must be strictly adhered to).

Attach your answers and any supporting documents (up to 5 only), files no larger than 200kb or a 3-minute video answering the questions below:

1. What steps did you undertake during the financial year 2021/2022 to improve your capabilities as a Mentee and how did that positively impact your business?
2. What was your greatest achievement as a Mentee during the financial year 2021/2022?
3. Please provide three (3) testimonials from BDMs highlighting your success as a Mentee. Include the name, company and title of the person providing the testimonial.
4. Why do you believe you should win this award?
5. Please describe your point of difference / unique selling points when servicing the residential mortgage needs of brokers.
6. Please describe the strategies you have used to grow your residential mortgage settlements, the number of loans written and loan book during the financial 2021/2022 and why these strategies yielded results.
7. What was your greatest achievement in mortgage broking during the financial year 2021/2022?

## BUSINESS METRICS AND PERFORMANCE

Item	Financial Year 2020	Financial Year 2021
Volume (\$) of residential mortgages settled (Please input \$ figures to the nearest thousand e.g. \$10,552,000)		
Number of residential mortgages settled		
Loan book value (\$) - residential mortgages (Please input \$ figures to the nearest thousand e.g. \$10,552,000)		
Conversion rate (%) residential mortgages		

## LODGING YOUR SUBMISSION

1. Include the award submission form on the first page of each printed submission.
2. Include the business metrics as requested on the second page of the submission.
3. Deliver the submission before or on the submission deadline.
4. Once you are ready to submit, please contact Leah Renwick ([leah@fbaa.com.au](mailto:leah@fbaa.com.au)) or Phillipa Byrne ([pbyrne@fbaa.com.au](mailto:pbyrne@fbaa.com.au)) at FBAA for your confidential upload link.