



Form HR011

Adviser Application Form

Adviser Application Form

Please complete all sections in block capitals, ticking boxes where appropriate.

How did you hear of this vacancy? PPI Employee National Press Local Press Personal/External recommendation

Introduced by:

Have you ever previously applied to Financial Partners for a job? NO YES

Details

1. Personal History

Surname Mr/Mrs/Miss

First Name

Date of Birth
(dd/mm/yyyy)

National Insurance/I.D. Number

Marital Status Single Married Widow Remarried

Have you been/are you divorced or separated? Yes No State when this occurred

Number of dependent/children

Age(s)

Nationality

Current Address

Postal Address

Telephone No.

Home

Business

Mobile

Do you own this property? Yes No Do you have a mortgage? Yes No

With whom is the mortgage?

How long have you lived here?

Please list all previous addresses for the last seven years, stating whether or not you owned the property and how long you lived at each.

Postal Address

2. Education and Training

Have you had a formal education in any of the following subjects?

Maths, Economics, Commerce, Accounting, Business Studies

Yes

No

GCSE

O level or equivalent

A level or equivalent

Degree or above – please state

What other qualifications do you hold?

3. Job History

Please provide full details showing CONTINUOUS EMPLOYMENT/unemployment record for the last five years, starting with the most recent, (The statement “see CV” is not acceptable.) If you have worked in the Financial Services industry prior to this five-year period please give details.

Company Name

Full Address

Type of Business

Position Held

Employed

Self employed

Start Date
(dd/mm/yyyy)

Salary/Income (US\$)

Leaving Date
(dd/mm/yyyy)

Salary/Income (US\$)

Reason for Leaving

Company Name

Full Address

Type of Business

Position Held

Employed

Self employed

Start Date
(dd/mm/yyyy)

Salary/Income (US\$)

Leaving Date
(dd/mm/yyyy)

Salary/Income (US\$)

Reason for Leaving

Company Name	
Full Address	
Type of Business	
Position Held	<input type="checkbox"/> Employed <input type="checkbox"/> Self employed
Start Date <i>(dd/mm/yyyy)</i>	Salary/Income (US\$)
Leaving Date <i>(dd/mm/yyyy)</i>	Salary/Income (US\$)
Reason for Leaving	

Over the past five years, how many employers have you worked for?

Have you ever been made redundant? Yes No

Give details

Are you employed now? Yes No

If not, how long have you been unemployed?

4. Bank Details

Onshore Bank

Name of Bank	Country
Branch Address	
Account Number	Sort Code
How long have you banked there?	Years

Offshore Bank

Name of Bank	Country
Branch Address	
Account Number	Sort Code
How long have you banked there?	Years

If you do not have an offshore bank account, please indicate whether you require us to provide you with the necessary application form to open one. Yes No

5. References

Completion of the following section is important. Full mailing address(es) required, mobile numbers are not acceptable. If you do not have an accountant and/or solicitor, then please provide at least 3-4 personal references. Where possible, these should be persons from public office such as MP/NP/Minister/Priest/Surgeon/Physician/Dentist/serviceman or woman, or past employers.

Professional Reference(s)

Name	
Company Name	
Company Address	
Telephone No.	Email Address

Name	
Company Name	
Company Address	
Telephone No.	Email Address

Name	
Company Name	
Company Address	
Telephone No.	Email Address

Accountant Reference

Name	
Company Name	
Company Address	
Telephone No.	Email Address

Solicitor Reference

Name	
Company Name	
Company Address	
Telephone No.	Email Address

6. Medical Details

Name of Doctor

Address

How long have you been registered with this doctor?

If less than 12 months, please give previous doctor's name and address.

Please state

Height

cm

Weight

kg

Are you in good health?

Have you ever been off work for health reasons for more than one week?

Yes No

If yes give details below.

Do you suffer any disability

Yes No

If yes give details below.

Are you willing to have a medical examination at our expense

Yes No

Give details

7. Financial Status

ASSETS	CURRENCY	VALUE
Value of property	US\$	
Value of contents	US\$	
Car	US\$	

LIABILITIES	CURRENCY	VALUE
Mortgage	US\$	
Loans (secured)	US\$	
Loans (unsecured)	US\$	
Hire purchase / finance house loans	US\$	

Other assets e.g. bank deposits, investments (please specify).
What investments do you hold personally?

Other liabilities (please specify)

ASSETS	CURRENCY	VALUE
	US\$	
	US\$	
	US\$	
	US\$	
Total	US\$	

LIABILITY(IES)	CURRENCY	VALUE
	US\$	
	US\$	
	US\$	
	US\$	
Total	US\$	

MONTHLY INCOME	VALUE
Own gross income	US\$
Expenses allowance (if any)	US\$
Other income	US\$
Spouse's gross income	US\$
Total	US\$

MONTHLY OUTGOING	VALUE
Rent/mortgage	US\$
Rates	US\$
Loan repayments	US\$
Fuel	US\$
Telephone	US\$
Life assurance	US\$
General Insurance	US\$
Total	US\$

Which credit card(s) do you hold?

Have you ever been declared bankrupt or made an arrangement with your creditors?

Yes No

Have you ever been convicted of ANY offence?

Yes No

Have you ever had any County Court Judgements against you?

Yes No

Have you ever been dismissed from any employment?

Yes No

Do you owe money to any of the companies detailed in section 3 of the application?

Yes No

If you answer Yes to any of these questions, please give full details including dates.

Do you have a current driving license? Please state the country

Yes No

Have you any current endorsements? (If yes, please give details)

Yes No

8. Outside Interests

Please indicate any hobbies sporting activities or other outside interests

9. Declaration

I declare that the statements in this Adviser Application are true. I also give my permission for the Company to carry out any credit reference, or other checks, as the Company considers necessary.

I am fully aware that any incomplete information/section may result in my application being rejected.

Signature

Date
(dd/mm/
yyyy)

10. Interviewer's Assessment

I have interviewed this recruit time on and approve his application

He/She is to be a member of team

My assessment of the interview is

Attachment(s)

Curriculum Vitae Valid Passport/ID Copy

Certificates References

Signature Date (dd/mm/yyyy)