

## Financial Capability and Wellbeing Program – Referral and Induction Form

**Our Financial Capability and Wellbeing Program** aims to build financial knowledge, skills and confidence and to support actions that develop a person’s financial wellbeing. We work one on one with a client and deliver workshops to build longer-term capability to better manage money and make informed financial decisions. The program is funded to support:

- people in receipt of a Commonwealth social security benefit, allowance or payment, or
- newly arrived migrants/ refugees/ non-citizens, or
- women experiencing family violence.

SECTION 1	Referrer Information		Referral Date
Referring agency			
Referrer’s Name		Referrer’s Title	
Phone		Email	

SECTION 2	Participant Information			
First Name		Surname		
Pronoun	<input type="checkbox"/> She/her <input type="checkbox"/> He/him <input type="checkbox"/> They/them <input type="checkbox"/> Self-describe _____	Do you identify as LGBTIQ?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Do not wish to disclose	
Date of Birth		Phone		
Street Address			Postcode	
Email Address				
Indigenous Status	<input type="checkbox"/> Aboriginal <input type="checkbox"/> Torres Strait Islander <input type="checkbox"/> Both <input type="checkbox"/> Neither	Country of Birth		
Main language spoken at home	<input type="checkbox"/> English <input type="checkbox"/> Indigenous language <input type="checkbox"/> Language other than English	Language		
		Interpreter?	Yes	<input type="checkbox"/> No <input type="checkbox"/>

### Further Participant Details

Does the client have one or more of the following impairments, conditions or disabilities?

Intellectual learning	<input type="checkbox"/>	Psychiatric	<input type="checkbox"/>	Sensory/Speech	<input type="checkbox"/>
Physical/diverse	<input type="checkbox"/>	Not stated	<input type="checkbox"/>	None	<input type="checkbox"/>

### Main source of income

Salary or wages	<input type="checkbox"/>	Govt payments	<input type="checkbox"/>	Self-employed	<input type="checkbox"/>
Other (e.g. super)	<input type="checkbox"/>	No income	<input type="checkbox"/>	Not stated	<input type="checkbox"/>

### Household composition -

Single (person living alone)	<input type="checkbox"/>	Single with dependents	<input type="checkbox"/>	Couple	<input type="checkbox"/>	Couple with dependents	<input type="checkbox"/>
Group (related adults)	<input type="checkbox"/>	Group (unrelated adults)	<input type="checkbox"/>	Homeless	<input type="checkbox"/>	Not stated	<input type="checkbox"/>

Office Use Only	Verbal consent certification (see over)		
I certify that verbal consent was provided from the participant as indicated overleaf.			
Name of Good Shepherd Employee	Signature of Good Shepherd Employee	Date	

**SECTION 3**      **Consent to Participate**

- The Financial Capability and Wellbeing program is free and voluntary. It will involve an assessment of your financial situation, gathering information, providing options to help you identify the best course of action.
- Financial coaches are not financial advisors, lawyers or accountants. Your coach provides information for learning purposes only. It is not financial advice and cannot be relied upon as financial advice.
- Financial coaches will not provide therapeutic counselling, or sell or recommend any financial product/service.
- Good Shepherd Australia New Zealand does not accept responsibility for any loss, damages or injury, financial or otherwise, suffered by anyone acting or relying on information provided.
- As part of our reporting process Good Shepherd seeks your consent to provide information to the referring agency named above on whether you have engaged in the coaching experience or not.
- No details of any of the discussions you have with your Coach will be shared with the referring agency as part of this information sharing.

**SECTION 4**      **Consent to the collection and use of personal information - Good Shepherd Australia New Zealand**

- In order to be able to provide you with assistance, Good Shepherd will store information about you.
- If you choose not to provide information as requested, it may not be possible for us to service your needs.
- Your privacy is important to us, and we have developed a privacy policy which describes how we collect, use, store and dispose of your personal information. You can find a copy of this on our website or we can email you a copy. You can request this at any time you are speaking to us.
- Information we collect may also be used for research and evaluation of the program, but not in a way that identifies you.
- We may be obliged to disclose information to other parties including where required by law & for quality/compliance auditing.
- From time to time we report de-identified data to our partners and funders, including federal and state governments. This reporting does not contain any personal information about you.
- Your information will be stored securely on GSA NZ systems and/or a system operated by InfoXchange, an Australian company that provides our record keeping system. Only people who need the information for their job and who have permission can look at your information.
- You may request to view the information we hold about you (but not about someone else) and correct it if it is inaccurate by contacting your financial capability coach.

**SECTION 5**      **Consent to the collection and use of personal information - Department of Social Services**

- De-identified information will be stored on a database called “Data Exchange”. This system is hosted by the Australian Government Department of Social Services. Your personal information that is stored by the Department on the Data Exchange will only be used by us for the purposes of managing your case.
- The Department de-identifies and aggregates data in the Data Exchange to produce information for policy development, grants program administration, and research and evaluation purposes. This includes producing reports for sharing with organisations. This information will not include information that identifies you, or information that can be used to re-identify you, in any way.
- You can find more information about the way the Department will manage your personal information in the Department’s APP privacy policy, which the Department has published on its website. This policy contains information about how you may access the personal information about you that is stored on the Data Exchange and seek correction of that information. This policy also includes information about how you may complain about a breach of the Australian Privacy Principles by the Department, and how the Department will deal with your complaint.

Do you understand the information you have just heard or read?

Do you consent for us to collect and share your information on these terms?

**Signature of participant**

**Date**

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