

Financial Counselling Services

Letter of Engagement

This **Letter of Engagement** is provided to all new and prospective clients who are looking to access our Financial Counselling Services. Should you wish to receive Financial Counselling from Uniting WA, please complete the **Client Declaration** below, and return your completed **Declaration** to us before, or during, your first scheduled appointment with our Financial Counsellors.

About the service.

Our Financial Counselling Service is free and confidential, and is delivered by our team of accredited Financial Counsellors, who will provide you with one-on-one support to help understand your financial problems, discuss your options and support you to find a solution.

Uniting WA does not guarantee that we can achieve a specific financial outcome for you. Instead, we work alongside you, toward realistic and achievable financial goals, taking into account the options and prospective solutions available.

Our Financial Counselling Services may involve advocating on your behalf (with your consent to do so), negotiation and / or making referrals to relevant services.

Conflict of interests.

Uniting WA seeks to avoid conflict of interests. We will cease to provide services to you if it is evident that we are already acting for another family member. In that situation we will refer you to another Financial Counsellor.

Privacy and confidentiality.

Uniting WA is committed to keeping personal and sensitive information private. Uniting WA manages the personal and sensitive information we collect in accordance with the Australian Privacy Principles, and the Privacy Act 1988.

As part of delivering Financial Counselling Services, we collect personal information from you. This information is securely stored within your Client File and is only accessible to authorised staff. This personal information is not shared unless:

- We have your consent to do so (via the **Financial Counsellor Authorisation Form**)
- We are compelled by law to do so (e.g., in response to a subpoena issued by the court).

Client communications.

To deliver high-quality, efficient services to you, we request that you respond to any communications (letters, emails and / or phone calls) you receive from us within a reasonable time period. Where our team does not hear from you within 14 days, it will be assumed that you no longer require our services, and your Client File will be closed.

Client Responsibilities

As a client receiving our Financial Counselling Services, you are responsible for:

- Treating Uniting WA staff with courtesy and respect at all times
- Willingly and actively participating in your engagements with us
- Providing us with accurate and truthful details of your circumstances
- Providing as much notice as possible in relation to any appointment cancellations.

Uniting WA reserves the right to cease the provision of Financial Counselling Services to you where you have failed to meet the above responsibilities and / or in the event that Uniting WA should have inadequate resources and / or funding to continue the delivery of the service.

Client Feedback Survey

We are committed to making a positive difference in the lives of those we support. To help us do this, we conduct a random survey of participating clients who have received our services in the previous six (6) month period. All feedback remains confidential, and is used to help us review our performance and make improvements to our services.

Please indicate below if you consent to being contacted as part of our Client Feedback Survey:

<input type="checkbox"/>	Yes, I am happy to be contacted as part of your Client Feedback Survey.
<input type="checkbox"/>	No, I do not wish to be contacted as part of your Client Feedback Survey.

Client Declaration

By signing this declaration, you acknowledge that you have read, understood, and agree to, the terms and information provided above.

Client 1 Details		Client 2 Details	
Name:		Name:	
Phone:		Phone:	
Email:		Email:	
Signature:		Signature:	
Date:		Date:	