

# YOUNG LEADERS IN FINANCE AWARDS 2018

## Mortgage Broker of the Year

This award recognises the mortgage broker that best represents the industry across key factors, including, but not limited to, loan volumes, loan book growth, compliance, submission quality and customer service, as well as business processes, systems, stakeholder engagement and customer relationship abilities.

### Eligibility

This award is open to all mortgage brokers who have been in this role since 1 July 2015 and based on activities over the 2017 calendar year.

**All entrants must be aged 30 years or younger for the duration of the work being completed between 1 January 2017 and 31 December 2017.**

### Submission criteria and requirements

Please answer the following questions (400 words max per question):

- Highlight a planned and successfully-executed business building strategy.
- Demonstrate a market-leading/best-practice approach to customer service and how that increases mortgage volumes.
- Highlight innovation in your business and how that has supported business growth.
- Provide case studies or examples that showcase how they cater for the needs of clients and how that influences business success.

### Supporting documentation

Optional: Please include any supporting material in your submission so that the judges can consider it. This material can include references, testimonials, statistics, video, media coverage and financial or business metrics and/or statements and third-party independent data reports to support your submission.

We also encourage entrants to submit an optional short video - up to 30 seconds long - answering the question, **“What does success mean to you?”**

### Company information

Aggregator/brokerage (name and contact details)	
State manager (name and contact details)	
Years in industry	
Mortgage volumes (calendar year 2017)	
Other volumes (calendar year 2017) – i.e. insurance	

**Residential Mortgage Metrics**

Please complete if applicable

Item	2016 (Calendar Year)	2017 (Calendar Year)
Volume (\$) of residential mortgages settled (please input \$ figures to the nearest thousand <i>e.g.</i> \$10,552,000)		
Number of residential mortgages settled		
Loan book value (\$) - residential mortgages (please input \$ figures to the nearest thousand <i>e.g.</i> \$10,552,000)		
Conversion rate (%) residential mortgages		

**If you also have Commercial offerings, please complete the below table:****Commercial Mortgage Metrics**

Please complete if applicable

Item	2016	2017
Volume (\$) commercial mortgages		
Number of commercial mortgages		
Volume (\$) business loans		
Number of business loans		
Value (\$) commercial bills		
Number of commercial bills		
Value (\$) cash flow finance		
Number of cash flow finance		
Value (\$) inventory and debtor funding		
Number of inventory and debtor funding		
Value (\$) working capital finance		
Number of working capital finance		
Value (\$) franchise funding		
Number of franchise funding		
Value (\$) construction and development finance		
Number of construction and development finance		

SCORE	RESPONSE
<b>Score 1 – 2</b>	<b>Did not</b> meet submission requirements. Provided <b>little to no</b> relevant supporting documents. <b>Did not</b> meet expectations.
<b>Score 3 - 4</b>	<b>Partially</b> highlighted/demonstrated submission requirements. Provided <b>little to no</b> relevant supporting documents. <b>Did not</b> meet my expectations.
<b>Score 5 - 6</b>	Highlighted/demonstrated submission requirements. Provided <b>relevant</b> supporting documents. <b>Met</b> my expectations.
<b>Score 7 – 8</b>	<b>Accurately</b> highlighted/demonstrated submission requirements. Provided <b>clear and relevant</b> supporting documents <b>Met</b> my expectations.
<b>Score 9 – 10</b>	<b>Accurately and concisely</b> highlighted/demonstrated submission requirements Provided <b>clear and relevant</b> supporting documents <b>Exceeded</b> my expectations.