

# MFAA Mentor Profile



## Mentor Profile Details

<b>Full Name:</b>	Jacob Birch
<b>Business Name:</b>	Birch Financial Pty Ltd
<b>Office Location/s:</b>	100a Taiyul Road North Narrabeen NSW 2101
<b>Aggregator:</b>	Connective
<b>Phone:</b>	0416090064
<b>Email:</b>	jacob@birchfinancial.com.au
<b>Website:</b>	www.birchfinancial.com.au

## Additional Mentor Information

**Years Practicing as a Broker:**

3 years

**Qualifications (Lending, Mentoring, Coaching, Other):**

Diploma Business Management  
Diploma in Mortgage Broking  
Mentoring Program completed (MFAA)  
Business Sports Coaching (CBA)

**Program Structure/Outline (If running own program):**

I am all about building relationships, so the list below is an outline however not limited to and can be adapted to each individual.

1. An initial one-on-one consultation to discuss your background, experience and interests and reasons why you want to join the industry.
2. Implement and discuss strategies, business goals and ways to explore business opportunities as well as existing marketing and network.
3. Receive mentoring support as and when necessary with diarised weekly catch-ups
4. Meetings will be conducted via Zoom as well as phone calls - face to face where possible
5. Ongoing training and support in relation to end-to-end loan writing process such as structuring, bank policy and credit an dcompliance notes
6. Tips on how to grow and mantain your buiness and well as strategies to develop new networks
7. You will may have access to admin and loan processing if required.

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**Mentor Style  
(Local or Remote):**

Meetings will be conducted via Zoom as well as phone calls - face to face where possible with diarised meetings and happy to receive adhoc phone calls.

**Service  
Commitment:  
(Availability,  
Query turnaround  
times e.g. 24/7)**

My commitment is return of call or email within a 4 hour period and I am available at call for anything that would keep you awake at night

**Payment  
Structure/Options  
if applicable:**

Cost will be weekly - paid Monthly

I do not want any of your upfront commission or trail - its your business and i am here for supportt

**Additional  
Comments and/or  
Services:**

I have over fifteen years experience in the finance industry, having worked for four of Australia's leading banks.

With this considerable industry knowledge and experience, I can tailor mentoring to assist and help you navigate the challenges and stresses that you may encounter on your journey.

My focus is always on building strong relationships and I will be there every step of the way to support you.