

# ADVANCED DIPLOMA OF FINANCIAL PLANNING (FNS 604 10)

## ENROLMENT FORM



PLEASE COMPLETE AND FAX TO 1300 366 170

### 1. YOUR DETAILS

TITLE  Mr  Mrs  Ms  Miss DATE OF BIRTH / /

SURNAME FIRST NAME

ADDRESS

POSTCODE

PHONE (W) PHONE (M)

EMAIL

COMPANY POSITION/ROLE

DEALER GROUP ASSOCIATION MEMBERSHIP

### 2. FULL ADVANCED DIPLOMA (GST Exempt)

Advanced Diploma of Financial Planning  
 Early Bird Discount + SPECIAL OFFER

Online Learning	Workshop	Days
was \$1,890	was \$3,350	
<input type="checkbox"/> \$1,560	<input type="checkbox"/> \$2,795	6

### 3. SPECIAL OFFER

FREE Professional Pathway Program with full enrolment

- Access to a formal mentoring program.
- Complimentary subscription to industry news and events.
- Preferential pricing on elective specialist knowledge subjects



- |   |                        |
|---|------------------------|
| <input type="checkbox"/> SMSF             | \$260 (normally \$520) |
| <input type="checkbox"/> Margin Lending   | \$260 (normally \$520) |
| <input type="checkbox"/> Foreign Exchange | \$260 (normally \$520) |
| <input type="checkbox"/> Derivatives      | \$260 (normally \$520) |

### 4. INDIVIDUAL ADVANCED DIPLOMA SUBJECTS (GST Exempt)

	RPL	Online Learning	Workshop
ADFP 1 – Taxation	<input type="checkbox"/>	<input type="checkbox"/> \$280	<input type="checkbox"/> \$595
ADFP 2 – Estate Planning	<input type="checkbox"/>	<input type="checkbox"/> \$280	<input type="checkbox"/> \$595
ADFP 3 – Advanced Investments	<input type="checkbox"/>	<input type="checkbox"/> \$280	<input type="checkbox"/> \$595
ADFP 4 – Financial Planning	<input type="checkbox"/>	<input type="checkbox"/> \$880	<input type="checkbox"/> \$1,195

### 5. PAYMENT

Please Debit \_\_\_\_\_ from my:  Visa  MasterCard

CARDHOLDER'S NAME \_\_\_\_\_

\_\_\_\_\_  
 CARD NUMBER

CARDHOLDER'S SIGNATURE \_\_\_\_\_ EXPIRY / /

- |  |  |
|--|--|
| <input type="checkbox"/> A Bank Transfer has been made to:<br>Name: Mentor Education<br>NAB BSB: 083-004<br>ACC: 894048117 | <input type="checkbox"/> Cheque payable to<br>Mentor Education<br>is enclosed. |
|--|--|

### 6. IDENTIFICATION VERIFICATION

Please scan and email, to learn@mentoreducation.com.au or fax to 1300 366 170 with your completed Enrolment Form, one of the following forms of photo identification:

- Current Passport (any nationality)  
 Current Drivers Licence (Australian only)

### 7. VERIFYING YOUR PAST QUALIFICATIONS

If you wish to claim National Recognition or Recognition of Prior Learning (RPL) for courses you have previously completed, please sign consent below:

I authorise Mentor Education, to collect use, disclose and store personal information about me for the purposes of enrolment and verifying my qualifications.

Additionally, I allow third parties holding personal information about me to release such information to Mentor Education for the purpose of verifying my past qualifications.

I agree not to assert any claims or cause of action of any kind against Mentor Education, its agents, clients, employees, and the individuals contacted by Mentor Education arising out of their qualification verification enquiry.

I certify that all my qualifications are true and correct.

NAME \_\_\_\_\_

SIGNATURE \_\_\_\_\_ DATE / /

### 8. EDUCATION

What is your highest COMPLETED school level? (Tick only one)

- Year 12  Year 11  Year 10  Year 9 or lower

Which year did you complete that school level? \_\_\_\_\_

Since leaving school, have you FULLY COMPLETED any qualifications?

- Bachelor Degree or Higher Education  
 Advanced Diploma or Associate Degree  
 Diploma (or Associate Certificate / Technician)  
 Certificate IV (or Advanced Certificate / Technician)  
 Certificate III (or Trade Certificate)  
 Certificate II  None  
 Certificate I  Other \_\_\_\_\_

If you are Victorian, under 25 years of age and have never attended a school, TAFE or other training provider in Victoria:

What is your VSN? \_\_\_\_\_

PLEASE CONTINUE OVERLEAF



## 9. EMPLOYMENT

Of the following categories, which best describes your current employment status?

- Full-time employee  Part-time employee  
 Casual/temp employee  Employer  
 Employed – unpaid worker in a family business  
 Unemployed – seeking full-time work (Job Seeker)  
 Unemployed – seeking part-time work (Job Seeker)  
 Self employed – not employing others  
 Not employed – not seeking employment

## 10. STUDY GOALS

- To get a job  For personal interest  To get a better job / promotion  
 To develop my business  For self development  It was a requirement of my job  
 To try for a different career  Other  I needed extra skills for my job

## 11. BACKGROUND

- Country of Birth?  Australia  Other \_\_\_\_\_  
Tick if you are?  Aboriginal  Torres Strait Islander  
Language spoken at home?  English  Other \_\_\_\_\_  
I speak English...  Very well  Well  
 Not well  Not at all

## 12. DISABILITY

Do you consider yourself to have a disability, impairment or long-term condition?

- Yes  No

If Yes, please tick (you may select more than one):

- Hearing/deaf  Physical  
 Intellectual  Learning  
 Mental illness  Acquired brain impairment  
 Vision  Medical condition  
 Other \_\_\_\_\_

## 13. PRIVACY STATEMENT

I understand that Mentor Education (A&NZ) is a Registered Training Organisation [RTO] registered with the Australian Skills Quality Authority [ASQA] and is required to comply with the Privacy Act 1988 and the regulatory guidelines as determined by ASQA in compliance with the National Vocational and Training Regulation Act 2011.

I understand that from time to time Mentor Education is required to provide student and training activity data or reports in accordance with regulatory guidelines, as instructed by its governing registering body or government authority or in compliance with the terms and conditions of contracts for government funded training.

I understand that Mentor Education, the government or relevant authority may use this information to assist in planning, administration, policy development, program evaluation, resource allocation, reporting and/or research activities. For these and other lawful purposes, Mentor Education, the government or relevant authority may also disclose information to its consultants, advisers, various government agencies, professional bodies and/or other organisations.

For more information in relation to how student information may be used or disclosed refer to the Privacy Policy at [www.mentoreducation.com.au](http://www.mentoreducation.com.au)

- I wish to opt-out of the complementary subscription to industry news and events (as per section 3.2 'Special Offer').

## 14. FEES AND REFUNDS

Fees and refunds are detailed in Mentor Education's Student Information Guide (please visit - [www.mentoreducation.com.au](http://www.mentoreducation.com.au))

The following is a summary of key points:

- Learners have two attempts to complete multiple-choice assessments. Third attempt available at a fee of \$95.
- An extension of time is available at a fee of \$145.
- If a learner re-enrols in a course that has lapsed, the learner will receive a 20% discount off the recommended retail price published on the Mentor Education website.
- Re-marking of the Statement of Advice (SoA) will attract a \$195 fee for each submission.
- Re-issue of a certificate (partial or full completion) will attract a \$50 fee for each.
- Re-Issue of manuals will attract a \$75 fee for each manual. This fee includes postage costs within Australia.

Refunds will not be applicable in instances where materials have been distributed or where external provider fees are due. A refund of course fees may be made when Mentor Education is unable to proceed with the scheduled training.

For further information refer to the Student Information Guide ([www.mentoreducation.com.au](http://www.mentoreducation.com.au)).

## 15. DECLARATION

I declare that to the best of my knowledge all the information supplied on, and with this enrolment form is true and complete, I agree to abide by the conditions described in the Student Information Guide and in the terms and conditions contained therein.

I consent to:

- The disclosure of personal information as described in the privacy statement.
- Mentor Education emailing me information in relation to its products and services.
- Mentor Education using my course feedback and any content collected during my studies in marketing and course content.

SIGNATURE \_\_\_\_\_

DATE / /

## WHEN COMPLETE

**EMAIL**  
[learn@mentoreducation.com.au](mailto:learn@mentoreducation.com.au)

**POST**  
with your cheque to:  
Mentor Education  
Level 2, 349 Collins Street  
Melbourne, VIC 3000

**FAX**  
AUS: 1300 366 170  
INT: +61 3 9614 1877