

SPECIALIST ADVISER COURSES

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. FOUNDATIONAL KNOWLEDGE (GST EXEMPT) Compulsory

Online Learning Workshop RPL

General Advice Australian Industry Essentials \$260 \$440

Optional

Personal Advice Financial Advice Fundamentals (Skills) \$260 N/A

3. ASIC SPECIALIST ADVISER (GST EXEMPT)

Online Learning Workshop Days

Life Insurance \$520 \$880 2

Investments \$520 \$880 2

Superannuation \$520 \$880 2

SMSF (you must have completed Superannuation) \$520 N/A

Derivatives (General Advice Only) \$520 N/A

Foreign Exchange \$520 N/A

Margin Lending & Geared Investments (General Advice Only) \$520 N/A

General Insurance (General Advice Only) \$260 N/A

4. PAYMENT

Please Debit \$ _____ from my : Visa MasterCard

CARDHOLDER'S NAME

CARD NUMBER

CARDHOLDER'S SIGNATURE EXPIRY / /

A Bank Transfer has been made to:
Name: Mentor Education
NAB BSB: 083-004
ACC: 894048117

Cheque payable to
Mentor Education
is enclosed.

5. 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)

6. 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? _____

7. 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

8. 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

PLEASE CONTINUE OVERLEAF

9. 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

10. 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 _____

11. 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

12. 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 / /

13. FEES AND REFUNDS

Fees and refunds are detailed in Mentor Education's Student Information Guide (please visit - 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).

14. 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 providing information to media and industry association partners for the purpose of providing you with industry eNewsletters and industry association membership.
- 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

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