

Enrolment Form

Accountant's Financial Planning Qualifications

Section 1 — Personal Information

Kaplan student ID			
Title:		Gender	<input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Other
First name		Surname	
Email		Date of birth	
Job title		Organisation	
Telephone	(W)	(H)	(M)
Are you an authorised representative/employee of an AFS licensee? <input type="checkbox"/> Yes <input type="checkbox"/> No			
Name of licensee			
Name of training manager		Email	
Company name (must be provided if you select a business address as your delivery address)			
Residential address (This is a requirement for government reporting purposes, please do not enter a PO Box address)		Delivery address <input type="checkbox"/> Business <input type="checkbox"/> Same as residential address (must be the daytime delivery address that will be used for all correspondence)	
Building/Property name		Building/Property name	
Flat/Unit number		Flat/Unit number	
Street number		Street number	
Street name		Street name	
Suburb/Town		Suburb/Town	
State		State	
Postcode		Postcode	
Country		Country	
Do you have any special needs that need to be taken into account to support your learning (e.g. language, literacy, access)?			Please specify below: Yes <input type="checkbox"/> No <input type="checkbox"/>

Section 2 — Unique Student Identifier (USI)*

From 1 January 2015, Kaplan can be prevented from issuing you with a nationally recognised VET qualification or statement of attainment when you complete your course if you do not have a Unique Student Identifier (USI). In addition, we are required to include your USI in the data we submit to NCVET. If you have not yet obtained a USI you can apply for it directly at <http://www.usi.gov.au/create-your-USI/> on computer or mobile device.

Your USI must be provided at the time of enrolment.

Please note that if you would like to specify your gender as 'other' you will need to contact the USI Office for assistance.

Unique Student Identifier (USI)
(if you have one already)

Section 3 — Course and Subject selection

Note: If you are seeking exemptions please refer to the Exemption kit available on the Kaplan Professional website.

Select either the individual subjects or the package/s you wish to enrol in.

Entry to the Accountant's *Financial Planning qualifications* is only available if you hold the CA Designation, CPA Designation, or IPA Membership (MIPA status). A certified copy of your certificate or a letter confirming membership must be attached with this form.

Individual subjects		Tick as required
AccountantsFP	Accountants Financial Planning	<input type="checkbox"/> \$315
DFP2	Insurance and Risk Protection	<input type="checkbox"/> \$585
ASP	Accountants SMSF Program	<input type="checkbox"/> \$585
DFP4	Securities and Managed Investments	<input type="checkbox"/> \$585
Kaplan Recommended Packages		Tick as required
CA, CPA and IPA (with MIPA Status) Membership package: 4 above subjects: o Includes the award of the (FNS50615) Diploma of Financial Planning qualification o Includes RG146 in Financial Planning, Life Insurance, Superannuation, Securities & Managed Investments o Provide advice in SMSF accreditation.		<input type="checkbox"/> \$1,995
TOTAL (individual subjects and packages)		\$

Section 4 — Additional Information (AVETMISS)

The National Centre for Vocational Education Research (NCVER) is a professional and independent body responsible for collecting, managing, analysing, evaluating and communicating research and statistics about vocational education and training (VET) nationally. The Australian Vocational Education and Training Management Information Statistical Standard (AVETMISS) provides a national framework for the consistent collection and dissemination of VET information throughout Australia. As Kaplan Professional is a registered training organisation, it is a requirement that enrolment data we collect from our customers, both new and existing be AVETMISS compliant. We encourage you to answer the questions below, however it is not compulsory.

Language and cultural diversity

In which country were you born?	<input type="checkbox"/> Australia <input type="checkbox"/> Other (Please specify):	
Do you speak a language other than English at home? (If more than one language, indicate the one that is spoken most often)	<input type="checkbox"/> English only <input type="checkbox"/> Yes/other (Please specify):	
Are you of Aboriginal or Torres Strait Islander origin? (For persons of both Aboriginal and Torres Strait Islander origin, mark both 'Yes' boxes)	<input type="checkbox"/> No	<input type="checkbox"/> Yes (Torres Strait Islander) <input type="checkbox"/> Yes (Aboriginal)

Disability

Do you consider yourself to have a disability, impairment or long-term health condition?	Yes <input type="checkbox"/> No <input type="checkbox"/>	
If you indicated the presence of a disability, impairment or long-term condition, please select the area(s) in the following list: (You may indicate more than one area)	<input type="checkbox"/> Hearing/deaf <input type="checkbox"/> Physical <input type="checkbox"/> Intellectual <input type="checkbox"/> Learning <input type="checkbox"/> Mental illness	<input type="checkbox"/> Acquired brain impairment <input type="checkbox"/> Vision <input type="checkbox"/> Medical condition <input type="checkbox"/> Other

Schooling

What is your highest completed school level? (Please tick one box only)	<input type="checkbox"/> Never attended school <input type="checkbox"/> Year 8 or below <input type="checkbox"/> Year 9 or equivalent	<input type="checkbox"/> Year 10 or equivalent <input type="checkbox"/> Year 11 or equivalent <input type="checkbox"/> Year 12 or equivalent
Are you still enrolled in secondary or senior secondary education?	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Previous qualification achieved

Have you successfully completed any of the qualifications listed? <input type="checkbox"/> Yes <input type="checkbox"/> No (If Yes , then tick the appropriate boxes)	<input type="checkbox"/> Certificate I <input type="checkbox"/> Certificate II <input type="checkbox"/> Certificate III (or trade certificate) <input type="checkbox"/> Certificate IV (or advanced certificate/technician) <input type="checkbox"/> Diploma (or associate diploma) <input type="checkbox"/> Advanced diploma or associate degree <input type="checkbox"/> Bachelor degree or higher <input type="checkbox"/> Other education (including certificates of overseas qualifications not listed above)
---	---

Employment

Of the following categories, which **best** describes your current employment status (please tick **one** only):

For casual, seasonal, contract and shift work, use the current number of hours worked per week to determine whether full time (35 hours or more per week) or part-time employed (less than 35 hours per week).

Full-time employee
 Part-time employee
 Self-employed (not employing others)
 Self-employed (employing others)
 Employed (unpaid work in a family business)
 Unemployed — seeking full-time work
 Unemployed — seeking part-time work
 Not employed — not seeking employment

Study reason

Of the following categories, select the one which **best** describes the main reason you are undertaking this course/traineeship/apprenticeship (Tick **one** box only):

To get a job
 To develop my existing business
 To start my own business
 To try for a different career
 To get a better job or a promotion
 It was a requirement of my job
 I wanted extra skills for my job
 To get into another course of study
 For personal interest or self-development
 Other reasons

Section 5 — Payment Details

Payment options

Cheque (Please make cheque payable to Kaplan Education Pty Ltd)

Cheque no.

Credit card payment

We take your privacy seriously. Kaplan is unable to accept credit card details via email or in a word/pdf document format. If you wish to make a payment by credit card, you can enrol via one of the below options:

- Enrol online via your student portal. Login or register if you are a new student <<http://www.kaplanprofessional.edu.au/enrol/>>.
- Call one of our Student Services representatives on [1300 662 203](tel:1300662203) to enrol over the phone.

Alternatively, please indicate how you would like to pay below. We will contact you once your invoice is ready to arrange payment over the phone or via your secure online student portal).

I wish to pay by MasterCard Visa AMEX (Additional 2.5% surcharge)

Pay online

Kaplan will email you a copy of your invoice once it is ready to pay online via your student portal.

Pay over the phone

Kaplan will call once your invoice is ready to pay. If the person Kaplan needs to contact is not you, please provide their name and the best contact number to reach them below.

Contact name

Contact no.

Invoice company (Only available to companies with an approved Kaplan Professional account. The invoice will be sent to the address specified on the company account. To authorise this invoice request you must be an existing contact on your company account with Kaplan Professional Education. In the absence of an authorised signature, an email will be sent for approval of enrolment.)

Corporate account name

Corporate account no.

Training manager name

Training manager no.

Invoice to name

Invoice to no.

Details for receipt (Please complete this section if payment is made by a third party)

Title

First name

Last name

Job title

Email

Telephone

(W)

(H)

(M)

Company name

Number and street name

Suburb

State

Postcode

Privacy Statement and Student Declaration

Prices are valid until 31 December 2018 and GST exempt (except ALPA, TASACL, TASACC, KUDOS, ISMSF, all Corporate Short Courses, Agile Compliance Training, China Ready, which includes GST). Kaplan Professional Education reserves the right to review its pricing.

Your enrolment is subject to the terms and conditions available on our website <<http://www.kaplanprofessional.edu.au/faqs/studentpolicies/>>.

If you do not have access to our website, please contact our student services team on 1300 662 203 and we will send a copy of the terms and conditions to you. Your signature below constitutes that you have read and accept the enrolment terms and conditions, including our refund policy. It is also confirmation that all details provided at the time of enrolment are true and accurate and you agree to notify Kaplan Professional if any details on this enrolment form change.

Kaplan Professional collects your personal information (including your name, address, date of birth and other identifying information) for the purpose of administering your enrolment in your chosen course(s) or program(s) of study. Your enrolment may not be processed or continued if you do not provide all of the information requested. We may disclose personal information about you in accordance with our privacy policy, including to third parties seeking to verify the qualification(s) attained through your course(s) of study. Our privacy policy contains detailed information about how we handle your personal information, how you can access and correct the personal information we hold about you, or make a privacy complaint. You may contact the Privacy Officer (privacy@kaplan.edu.au) for more information. A copy of our privacy policy is available at <<http://www.kaplanprofessional.edu.au/privacy-policy>>.

I consent to Kaplan Professional providing my current enrolment status, (and study plan if applicable) to my current employer or financial services licensee (whichever is applicable) for the subject/s in which I am enrolling.

Yes No

Student Declaration and Consent

Under the *Data Provision Requirements 2012*, Kaplan is required to collect personal information about you and to disclose that personal information to the National Centre for Vocational Education Research Ltd (NCVER).

Your personal information (including the personal information contained on this enrolment form and your training activity data) may be used or disclosed by Kaplan for statistical, regulatory and research purposes. Kaplan may disclose your personal information for these purposes to third parties, including:

- School – if you are a secondary student undertaking VET, including a school-based apprenticeship or traineeship;
- Employer – if you are enrolled in training paid by your employer;
- Commonwealth and State or Territory government departments and authorised agencies;
- NCVER;
- Organisations conducting student surveys; and
- Researchers.

Personal information disclosed to NCVER may be used or disclosed for the following purposes:

- Issuing statements of attainment or qualification, and populating authenticated VET transcripts;
- facilitating statistics and research relating to education, including surveys;
- understanding how the VET market operates, for policy, workforce planning and consumer information; and
- administering VET, including programme administration, regulation, monitoring and evaluation.

You may receive an NCVER student survey which may be administered by an NCVER employee, agent or third party contractor. You may opt out of the survey at the time of being contacted.

NCVER will collect, hold, use and disclose your personal information in accordance with the *Privacy Act 1988* (Cth), the VET Data Policy and all NCVER policies and protocols (including those published on NCVER's website at www.ncver.edu.au).

Your signature below constitutes that the information provided to the best of your knowledge is true and correct, and that you consent to the collection, use and disclosure of my personal information in accordance with the Privacy Notice above.

Please note that if you are under the age of 18, a parent/guardian signature is required.

Student name		Student signature	
Parent/Guardian name		Parent/Guardian signature	
Date		Date	

Email to enrolments@kaplan.edu.au | **Fax to** 1300 137 802