

Diploma of Financial Planning

(FNS50615)

To complete your application form:

1. Complete all the questions by typing or writing into the spaces provided. Fields marked with * are compulsory
2. Read and sign the declaration at the end of the form by typing your full name
3. Provide a copy of only one form of ID (e.g., driver's licence, passport, birth certificate, Medicare card)
4. Save or scan and then email the completed enrolment form along with a scanned copy of your ID to learn@mentor.edu.au

1 Personal Information

Salutation*: Dr Mr Mrs Ms Miss Other

Full Name*:

Preferred Name: Gender*: Male Female Other

Date of Birth*:

Permanent Residential Address (Cannot be a P.O. Box)

Property Name (if applicable) Unit Number (if applicable)

Street Address*:

Suburb*: State*:

Postcode*: Country*:

Business Details

Company: Job Title:

Street Address or PO Box:

Suburb: State:

Postcode*: Country:

Primary Mailing Address*: Residential or Business

LinkedIn URL:

Office Phone: () Home Phone*: ()

Mobile Phone*:

Primary Email*:

Other Email:

Dealer Group:

Association Membership: AFA FPA SMSFA IFAAA CPA CA IPA MFAA Other

Have you previously studied with Mentor Education*? (Previously known as RG146 Training Australia) Yes No

2 Unique Student Identifier (USI)

! Important

All students undertaking any Nationally Recognised Training delivered by a Registered Training Organisation (RTO) are required by law to provide a USI. We cannot issue your Qualification or Statement of Attainment without a USI. To create a USI please visit www.USI.gov.au

Your USI*:

3 Course and Modules

Diploma of Financial Planning (FNS50615)	Online		Workshops		RPL	
	Price		Price	Days		
Full Course Enrolment	<input type="checkbox"/> \$1,499	<input type="checkbox"/> \$2,490	8	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$1,417	
Diploma of Financial Planning & Self-Managed Superannuation Funds (SMSF)	<input type="checkbox"/> \$2,019	<input type="checkbox"/> \$2,990	10	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$1,725	
or						
Modules						
DFP1 - Financial Advice	<input type="checkbox"/> \$520	<input type="checkbox"/> \$600	1.5	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$390	
DFP2 - Life Insurance	<input type="checkbox"/> \$520	<input type="checkbox"/> \$600	1.5	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$390	
DFP3 - Superannuation	<input type="checkbox"/> \$520	<input type="checkbox"/> \$600	1.5	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$390	
DFP4 - Investment Planning	<input type="checkbox"/> \$520	<input type="checkbox"/> \$600	1.5	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$390	
Statement of Advice Process (SOA)	<input type="checkbox"/> \$520	<input type="checkbox"/> \$800	2	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$390	
Self-Managed Super Funds (SMSF)	<input type="checkbox"/> \$520	<input type="checkbox"/> \$800	2	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$390	

Specialist Subjects	Online		RPL	
	Price			
Sales Excellence Program	<input type="checkbox"/> \$290			
Margin Lending	<input type="checkbox"/> \$520	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$390	
Foreign Exchange	<input type="checkbox"/> \$520	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$390	
Derivatives	<input type="checkbox"/> \$520	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$390	

Note (Office use only):

Total Enrolment Cost:

Dealer Group:

Association Membership:

 AFA FPA SMSFA IFAAA CPA CA IPA MFAA Other

Have you previously studied with Mentor Education*? (Previously known as RG146 Training Australia)

 Yes No

4 Study Reason

Of the following categories, which BEST describes your main reason for undertaking this course?

<input type="checkbox"/> To get a job	<input type="checkbox"/> To develop my existing business	<input type="checkbox"/> Personal interest or self-development
<input type="checkbox"/> To start my own business	<input type="checkbox"/> To try for a different career	<input type="checkbox"/> Other reasons
<input type="checkbox"/> To get a better job or promotion	<input type="checkbox"/> It was a requirement of my job	
<input type="checkbox"/> I wanted extra skills for my job	<input type="checkbox"/> To get into another course of study	

5 Language and Cultural Diversity

In which country were you born*?

 Australia Other, please specify:

Do you speak a language other than English at home*?

 No, English only Yes, please specify:

Are you of Aboriginal or Torres Strait Islander origin*?

 No Yes, Aboriginal Yes, Torres Strait Islander

6 Disability

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

 Yes No

If YES, 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"/> Medical Condition	<input type="checkbox"/> Vision	<input type="checkbox"/> Other, please specify:	<input type="text"/>		

7 Schooling

What is your highest COMPLETED school level*?

- | | | |
|--|--|--|
| <input type="checkbox"/> Year 12 or equivalent | <input type="checkbox"/> Year 11 or equivalent | <input type="checkbox"/> Year 10 or equivalent |
| <input type="checkbox"/> Year 9 or equivalent | <input type="checkbox"/> Year 8 or below | <input type="checkbox"/> Never attended school |

*Never completed any primary or secondary level education
- go to question 8*

Are you still enrolled in secondary or senior secondary education? Yes No

Please provide the name of the suburb/town with the postcode of your permanent home residence in Year 12

Suburb/town:

Postcode:

8 Previous Qualifications Achieved

Have you SUCCESSFULLY completed any of the following qualifications*? Yes No

If YES, then tick ANY applicable boxes.

- | | | |
|--|---|---|
| <input type="checkbox"/> Bachelor degree or higher degree | <input type="checkbox"/> Advanced diploma or associate degree | <input type="checkbox"/> Diploma (or associate diploma) |
| <input type="checkbox"/> Certificate IV (or advanced certificate/technician) | <input type="checkbox"/> Certificate III (or trade certificate) | <input type="checkbox"/> Certificate II |
| <input type="checkbox"/> Certificate I | <input type="checkbox"/> Other education (including certificates or overseas qualifications not listed above) | |

9 Employment

Of the following categories, which BEST describes your current employment status?
(Tick ONE box 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).

- | | | |
|--|--|---|
| <input type="checkbox"/> Full-time employee | <input type="checkbox"/> Part-time employee | <input type="checkbox"/> Self-employed - not employing others |
| <input type="checkbox"/> Self-employed - employing others | <input type="checkbox"/> Employed - unpaid worker in a family business | <input type="checkbox"/> Unemployed - seeking full-time work |
| <input type="checkbox"/> Unemployed - seeking part-time work | <input type="checkbox"/> Not employed - not seeking employment | |

10 Statements and Conditions

Privacy Statement

I understand that MENTOR EDUCATION Pty Ltd is a Registered Training Organisation [RTO 21683] 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 Pty Ltd 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 Pty Ltd, 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 Pty Ltd, the government or relevant authority may also disclose information to its consultants, advisers, various government agencies, media partners, 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](#).

Under the Data Provision Requirements 2012, MENTOR EDUCATION 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 MENTOR EDUCATION for statistical, regulatory and research purposes. MENTOR EDUCATION 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).

Fees and Refunds

Fees and refunds are detailed in Mentor Education [Student Information Guide](#)

The following is a summary of key points:

- Student have two attempts to complete multiple-choice assessments. A third attempt is available for a fee of \$15.
- An extension of time is available at a fee of \$145.
- If a student re-enrols in a course that has lapsed, the student will receive a 20% discount off the recommended retail price published on the Mentor Education website.
- 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 Pty Ltd is unable to proceed with the scheduled training. For further information refer to the [Student Information Guide](#).

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 on the following page. I authorise MENTOR EDUCATION Pty Ltd, to collect use, disclose and store personal information about me for the purposes of enrolment and verifying my qualifications.

I agree not to assert any claims or cause of action of any kind against MENTOR EDUCATION Pty Ltd, their agents, clients, employees, and the individuals contacted by MENTOR EDUCATION Pty Ltd arising out of their qualification verification enquiry. I certify that all my qualifications are true and correct.

Declarations

I declare that to the best of my knowledge all the information supplied in, 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, education, career and industry association partners for the purpose of providing you with industry eNewsletters, industry association membership, assist with you learning or suggesting other tools that can help with your professional and career development.
- Mentor Education using my course feedback
- the collection, use and disclosure of my personal information in accordance with the Privacy Notice above.

I have read and understood the course guide provided to me with the units of competency and I understand the requirements for completion of this qualification.

I have read, understood, and agree with these statements and conditions

Signature:

Date:

By entering my full name above, I understand and acknowledge that this constitutes a legally-binding digital signature.

11 Application Checklist

Before submitting your Student Enrolment Form please ensure:

I have completed all questions required of me on the Student Enrolment Form

I have read and accepted the terms in the Declaration on the previous page

I have provided a copy of one form of suitable identification (e.g., driver's licence, passport, birth certificate, or Medicare card)

I have completed the payment details in the payment form