

# 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 [pathways@publicaccountants.org.au](mailto:pathways@publicaccountants.org.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)

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:

## 2 Unique Student Identifier (USI)

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](http://www.USI.gov.au)

Your USI\*:

## 3 Course and Modules

Diploma of Financial Planning (FNS50615)	Online	Workshops		RPL	
	Price	Price	Days	Yes	No
Diploma of Financial Planning Full Course OR	<input type="checkbox"/> \$1,701	<input type="checkbox"/> \$2,241	8	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Diploma of Financial Planning & Self-Managed Superannuation Funds	<input type="checkbox"/> \$2,070	<input type="checkbox"/> \$2,691	10		
_____ or _____					
<b>Modules</b>					
DFP1 - Financial Advice	<input type="checkbox"/> \$468	<input type="checkbox"/> \$540	1.5	<input type="checkbox"/> Yes	<input type="checkbox"/> No \$351
DFP2 - Life Insurance	<input type="checkbox"/> \$468	<input type="checkbox"/> \$540	1.5	<input type="checkbox"/> Yes	<input type="checkbox"/> No \$351
DFP3 - Superannuation	<input type="checkbox"/> \$468	<input type="checkbox"/> \$540	1.5	<input type="checkbox"/> Yes	<input type="checkbox"/> No \$351
DFP4 - Investment Planning	<input type="checkbox"/> \$468	<input type="checkbox"/> \$540	1.5	<input type="checkbox"/> Yes	<input type="checkbox"/> No \$351
Statement of Advice Process (SOA)	<input type="checkbox"/> \$468	<input type="checkbox"/> \$720	2	<input type="checkbox"/> Yes	<input type="checkbox"/> No \$351
Self-Managed Super Funds	<input type="checkbox"/> \$468	<input type="checkbox"/> \$720	2	<input type="checkbox"/> Yes	<input type="checkbox"/> No \$351

Specialist Subjects	Online	RPL		
	Price	Yes	No	
Sales Excellence Program	<input type="checkbox"/> \$261			
Margin Lending	<input type="checkbox"/> \$468	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$351
Foreign Exchange	<input type="checkbox"/> \$468	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$351
Derivatives	<input type="checkbox"/> \$468	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$351

Note (Office use only) :

Total Enrolment Cost:

Membership No.

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?

- To get a job  To develop my existing business  Personal interest or self-development
- To start my own business  To try for a different career  Other reasons
- To get a better job or promotion  It was a requirement of my job
- I wanted extra skills for my job  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:

How well do you speak English\*?

Very well  Well  Not well  Not at all

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)

Hearing/deaf  Physical  Learning  Intellectual  Vision  Acquired brain impairment

Mental Illness  Medical Condition  Other, please specify:

## 7 Schooling

What is your highest COMPLETED school level\*?

- Year 12 or equivalent     
  Year 11 or equivalent     
  Year 10 or equivalent  
 Year 9 or equivalent     
  Year 8 or below     
  Never attended school

In which YEAR did you complete that school level\*?

Are you still attending secondary school\*?  Yes  No

Did you complete Year 12 in Australia\*?  Yes, what year?   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.

- Bachelor degree or higher degree     
  Advanced diploma or associate degree     
  Certificate I  
 Diploma (or associate diploma)     
  Certificate IV (or advanced technician)     
  Other Certificates  
 Certificate III (or trade certificate)     
  Certificate II

## 9 Employment

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

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

## 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](#).

### 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

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

## 12 Payment Details

Amount:

Note:  
(Office use only)

Choose your payment option

Credit Card

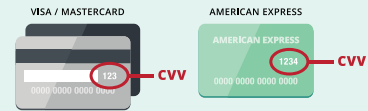
Visa       Mastercard       American Express

Card Number:     CVW:

Cardholders Name:

Expiry:

Signature:



By entering my full name above, I acknowledge that this constitutes a legally binding digital signature and I hereby authorise Institute of Public Accountants to charge my credit card for the enrolment in the amounts listed above.

Electronic Funds Transfer (EFT) is only for direct payments, not payment plans

Electronic Funds Transfer (EFT)

Acc Name: Institute of Public Accountants      Transfer date:

Bank: National Australia Bank

BSB Number: 083 054

Reference\*:

Acc Number: 464544727

\* For the reference, please put RG146 + Your Surname, eg. John Smith will have the reference: RG146SMITH

**IMPORTANT:** Please email confirmation of the transfer along with this enrolment form to [pathways@publicaccountants.org.au](mailto:pathways@publicaccountants.org.au)

Please send the completed payment form and supporting documentation to:

Email

[pathways@publicaccountants.org.au](mailto:pathways@publicaccountants.org.au)

Fax

(03) 8665 3130

Mail

Institute of Public Accountants, GPO Box 1637, Melbourne VIC 3001