



ENROLMENT FORM

| PERSONAL DETAILS | | | |
|--|--------------------------------|---|--|
| Title: | Given Name: | Middle Name: | Surname: |
| Date of birth: | | Male <input type="checkbox"/> Female <input type="checkbox"/> | |
| Phone: (BH): (AH/MOB): | | Business Email: Home Email: | |
| Unique Student Identifier <i>From the 1st January 2015 you will need to have a Unique Student Identifier (USI). We cannot accept enrolment without a valid USI. This is a legal requirement.</i> <i>You can obtain a USI by going to www.usi.gov.au Please ensure your USI is legible</i> | | | |
| Your USI is: | (this must be provided) | | |
| <u>Business Address (Required)</u> | | <u>Postal Address</u> | <u>Permanent Street Address (Required)</u> |
| Unit: | Street No: | PO Box: | Unit: Street No: |
| Street: | | Unit: Street No: | Street: |
| Suburb: | | Street: | Suburb: |
| State: | Postcode: | Suburb/Town: | State: Postcode: |
| No Business Address <input type="checkbox"/> | | State: Postcode: | |
| Employer: | | | |
| Name of Workplace Supervisor: | | | |
| Current Job Title & Description of Job Role: | | | |
| Please select Full time <input type="checkbox"/> Part Time <input type="checkbox"/> Casual <input type="checkbox"/> | | | |
| ADDITIONAL INFORMATION | | | |
| ** Please complete the following details about your prior education and learning background. ** This information is required by the relevant education authorities for the purpose of collecting statistics. Please refer to Privacy Statement. | | | |
| Are you still attending secondary school? | | <input type="checkbox"/> No <input type="checkbox"/> Yes | |
| What is your highest COMPLETED school level? (Tick ONE box only.) | | <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 | |
| In which YEAR did you complete that school level? | | | |

| | |
|---|---|
| Country of Birth? | <input type="checkbox"/> Australia <input type="checkbox"/> New Zealand <input type="checkbox"/> Other (please specify) |
| Prior education/Qualifications please select the levels you have reached or select No Qualification. <i>(Please note Tier 2 and Tier 1 are not qualifications)</i> | <input type="checkbox"/> No Prior Qualification <input type="checkbox"/> Certificate II <input type="checkbox"/> Certificate III <input type="checkbox"/> Certificate IV <input type="checkbox"/> Diploma <input type="checkbox"/> Degree or higher |
| Do you speak a language other than English at home? | <input type="checkbox"/> No, English only <input type="checkbox"/> Yes, other - Please specify |
| If yes, how well do you speak English? | <input type="checkbox"/> Assistance required <input type="checkbox"/> No assistance required |
| Do you require assistance with Language, Literacy and Numeracy? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Do you consider yourself to have a disability, impairment or long-term condition? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| If YES, then please indicate the areas of disability, impairment or long-term condition: (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 (please specify) |
| Do you require assistance with your Disability? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 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, Aboriginal <input type="checkbox"/> Yes, Torres Strait Islander |
| State your reason for undertaking the course (this must be completed) | |

COURSE ENROLMENT – Insurance Broking (please tick)

| | |
|--|---|
| <input type="checkbox"/> FNS30615 Certificate III in Insurance Broking | <input type="checkbox"/> Tier 1 Insurance Broking compliance short course |
| <input type="checkbox"/> FNS51215 Diploma of Insurance Broking | <input type="checkbox"/> Tier 2 General Insurance compliance short course |

Note: *If you have completed Tier 1 elsewhere and wish to complete the Diploma you must provide a validated copy of your Tier 1 Statement of Attainment or written approval for us to obtain one.*

Self Assessment Checklist

You should consider the following areas of expertise and select those you believe you are already competent in. By making these selections you are opting to undertake a pre-gap assessment test to determine whether you are eligible for exemption from some learning modules or individual assessments.

| Area of Expertise | Tick if Competent | Areas of Expertise | Tick if Competent |
|-----------------------------------|--------------------------|----------------------------------|--------------------------|
| Compliance Laws and Regulations | <input type="checkbox"/> | Burglary | <input type="checkbox"/> |
| Insurance Law and Regulations | <input type="checkbox"/> | Money | <input type="checkbox"/> |
| Fundamental insurance principles | <input type="checkbox"/> | Business Interruption | <input type="checkbox"/> |
| Private Motor Vehicle | <input type="checkbox"/> | Public and Products Liability | <input type="checkbox"/> |
| Home and Contents | <input type="checkbox"/> | Glass | <input type="checkbox"/> |
| Landlords | <input type="checkbox"/> | Electronic Equipment Breakdown | <input type="checkbox"/> |
| Residential Strata | <input type="checkbox"/> | Machinery Breakdown | <input type="checkbox"/> |
| Pleasure Craft | <input type="checkbox"/> | General Property | <input type="checkbox"/> |
| Personal Accident and Illness | <input type="checkbox"/> | Tax Probe | <input type="checkbox"/> |
| Personal Travel Insurance | <input type="checkbox"/> | Inland Transit | <input type="checkbox"/> |
| Trades and Mobile Business | <input type="checkbox"/> | Import and Export Transit | <input type="checkbox"/> |
| Retailer Packs | <input type="checkbox"/> | Directors and Officers Liability | <input type="checkbox"/> |
| Business Packs | <input type="checkbox"/> | Employment Practices | <input type="checkbox"/> |
| Office Packs | <input type="checkbox"/> | Statutory Liability | <input type="checkbox"/> |
| Commercial Strata | <input type="checkbox"/> | Crime/Fidelity | <input type="checkbox"/> |
| ISR | <input type="checkbox"/> | Cybercrime | <input type="checkbox"/> |
| Farm Packs | <input type="checkbox"/> | Professional Indemnity | <input type="checkbox"/> |
| Commercial Motor | <input type="checkbox"/> | Environmental Liability | <input type="checkbox"/> |
| Heavy Motor including Motor Fleet | <input type="checkbox"/> | Contract Works | <input type="checkbox"/> |
| Corporate Travel | <input type="checkbox"/> | Plant and Mobile Machinery | <input type="checkbox"/> |

Number of years employed in the General Insurance Industry _____

Number of years employed in Insurance Broking _____

Have you continuously worked within the General Insurance/Insurance Broking Industry? Yes No

Have you maintained continued professional development? Yes No

Short Courses Completed:

| | | | |
|--------------------------|--------------------------|------------------------------------|--------------------------|
| Tier 1 General Insurance | <input type="checkbox"/> | Tier 2 General Insurance | <input type="checkbox"/> |
| Tier 1 Insurance Broking | <input type="checkbox"/> | Tier 2 General (Insurance Broking) | <input type="checkbox"/> |

Student Declaration (this must be signed before acceptance of enrolment).

Privacy Notice

Under the *Data Provision Requirements 2012*, The Financial Services School Pty Ltd 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 The Financial Services School Pty Ltd for statistical, regulatory and research purposes. The Financial Services School Pty Ltd 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 a VET Statement of Attainment or VET 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 program 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).

Student Declaration and Consent

I declare that the information I have provided to the best of my knowledge is true and correct.

I consent to the collection, use and disclosure of my personal information in accordance with the Privacy Notice above.

By signing this form I understand I am committing myself to completing the traineeship/course. I am required to complete all the activities and work set down by the trainer from The Financial Services School. I understand I am required to actively seek assistance if I am experiencing any difficulties completing the course.

I have read and understood and agree to the terms and conditions outlined in this enrolment form and information pack/handbook provided and I understand I am required to hold a Unique Student Identifier (USI).

The Australian Skills Quality Authority (ASQA) may conduct a survey with you on our performance as a training provider, please tick the box if you **don't wish** to be contacted by ASQA.

STUDENT SIGNATURE

(Please Print and Sign)

DATE

PARENT/GUARDIAN SIGNATURE [or electronic acknowledgement]*

(Please Print and Sign)

DATE

*Parental/guardian consent is required for all students under the age of 18.

Invoicing Details

Name of party to be invoiced _____

Address _____

Email Address _____

DECLARATION/UNDERTAKING BY PERSON RESPONSIBLE FOR PAYMENT

I have read and understood the schedule of fees provided and agree to the terms and conditions of payment as outlined in the schedule of fees and agree to the terms and conditions below.

Name: _____

Signed _____ Dated _____

| |
|---|
| IMPORTANT INFORMATION ABOUT YOUR ENROLMENT |
|---|

Assessment and Statement of Attainment:

Three (3) attempts at an assessment are included in the tuition and assessment fees. Additional attempts will incur a fee to be negotiated. A qualification or statement of attainment, with an attached statement of results will be issued on completion of the qualification/ course.

Expected commitment by student

It is understood the student will be responsible for their own learning. It is the student's responsibility to contact The Financial Services School P/L if they are having any difficulties or require feedback. The Financial Services School P/L will offer support when requested.

When a student is undertaking a traineeship, the learning program is conducted co-jointly with the employer and the employer understands there may be some commitment required on their part to assist in the learning process – in accordance with regulations governing traineeships.

When a student is undertaking a course sponsored and paid for by their employer, the learning program is conducted co-jointly with the employer. The student understands the employer will be kept apprised of the student's progress if required.

Commitment of The Financial Services School Pty Ltd

The Financial Services School will provide the student/trainee with course material and assessment activities. The Financial Services School will provide ongoing feedback to students who submit their completed activities. The Financial Services School will work with employers to assist students complete the training course. The student may be required to access other sources of information available on the internet in order to complete their assessments – examples include accessing the Financial Ombudsman Service website.

Conditions

1. There are no fee reductions available to any student.
2. Each client will sign this Enrolment Agreement outlining the particular payment option that has been agreed upon.

3. Any variations to the above payment options are detailed in this Fee Schedule which supersedes this policy.
4. A client/student who has their fees overdue for 2 months or more from the due date, may have their course cancelled and the matter placed in the hands of a debt collection agency.
5. With the exception of the agreed traineeship program, additional on-site training and consulting will incur an additional hourly rate fee.
6. In the event of a student completing the qualification or short course prior to the scheduled billing period, the remaining balance will be invoiced before credentials are issued.

Non-Submission Policy

Students will be required to submit assessment tasks within a certain timeframe. The submission date will be noted on the assessment. Extensions of time may be granted if, under a traineeship program, discussions have been held with the employer representative, student and trainer to extend the submission date. Students who are not completing under a traineeship will only be granted two (2) extensions of time.

In the event of a client or student failing to submit assessments within the time frames provided where no further extension of time has been granted, The Financial Services School reserves the right to cancel the enrolment without any refund of fees paid.

Refund/Cancellation Policy

The purpose of this policy is to outline The Financial Services School policy on refunds, prior to commencement and throughout the various stages of the course.

Cancellation by the Client / Student

Cooling Off Period

In the event a client or student cancels their enrolment within fourteen (14) days and prior to any on-site visits by trainers/Assessors, inductions or provision of training materials or access to E learning, the client/student is entitled to a refund of the initial enrolment fee – less \$200 administration charge for costs incurred.

After this time, the initial enrolment fee is not refundable.

Cancellation by The Financial Services School

Should The Financial Services School cancel a course, students are entitled to a full refund (or pro-rata adjusted refund) or transfer of funds to another or future course. In this case, students will be given their preferred option.

Agreement

By completing and signing the declaration on this enrolment form you agree to the terms and conditions stated.

ENROLMENT FEES

Enrolment and training will not commence until fees have been paid. A tax invoice will be forwarded to you on receipt of the enrolment form. Please refer to the attached fee schedule and select which option you are taking.

CONTACT DETAILS

The Financial Services School Pty Ltd

RTO Provider Number 31916

PO Box 920 Morayfield 4506

Phone: (07) 5498 5176

Email: admin@thefss.com.au