

Accountant's Financial Planning qualifications

Kaplan Education Pty Ltd. ABN 54 089 002 371

Personal Information			
Unique Student Identifier (USI)*			
*From 1 January 2015, It is a federal government requirement that every student will need a Unique Student Identifier (USI) to obtain their Statement of Attainment or qualification from their RTO when undertaking nationally recognised study and training in Australia. For more information about how to get an USI visit http://www.usi.gov.au/Pages/default.aspx			
Kaplan Student ID:	INT	CO1	PC Code: PC-UJF257
Title: <input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss		Sex	<input type="checkbox"/> Male <input type="checkbox"/> Female
First name:		Last name:	
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:		Suburb:	
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)?			<input type="checkbox"/> No <input type="checkbox"/> Yes please specify below:
Terms of enrolment			
<p>Please note that students receive both hard copy and online subject notes. There are no additional fees for postage except for International deliveries. Prices are valid until 31 December 2014 and GST exempt. Kaplan Professional Education reserves the right to review its pricing. If multiple subjects are ordered, Kaplan will dispatch notes for the first subject only. This enrolment form is subject to the terms and conditions available on our website http://www.kaplanprofessional.edu.au/Study_Information/Financial_Services. 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.</p> <p>Your signature below constitutes that you have read and accept the relevant terms and conditions and policies.. 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.</p>			
Name:		Signature:	

email to enrolments@kaplan.edu.au **mail to** GPO Box 9995, Sydney NSW 2001 **fax to** 1300 137 802

Subject selection

IPA Membership: In order to receive the discounted **Generic Knowledge** enrolment for the *Financial Planning qualifications* you will need to provide a certified copy of your IPA certificate.

CA ANZ Membership: In order to receive the discounted **Generic Knowledge exemption** for the *Financial Planning qualifications* you will need to provide a certified copy of your CAANZ (formerly ICAA) certificate or membership letter.

CPA Membership: In order to receive the automatic **Generic Knowledge exemption** for the *Financial Planning qualifications* you will need to provide a certified copy of your CPA certificate.

Note: If you are seeking additional exemption 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.

Option 1. Accountants' Limited Licence (with Generic Knowledge exemption)				
Subject code	Subject name	Tick as required		
DFP1A	Generic Knowledge exemption applies if Certified CA or CPA Designation is held)	<input type="checkbox"/> \$0		
DFP1B	Financial Planning*	<input type="checkbox"/> \$270		
ASP	Accountants' SMSF Package (includes Superannuation and SMSF)	<input type="checkbox"/> \$490		
Option 2. Accountant's Limited Licence (no exemption)				
DFP1A	Generic Knowledge (Non members of a recognised professional body)	<input type="checkbox"/> \$220		
	or Generic Knowledge (IPA members only; IPA membership certificate must be attached)	<input type="checkbox"/> \$100		
DFP1B	Financial Planning*	<input type="checkbox"/> \$270		
ASP	Accountants' SMSF Package (includes Superannuation and SMSF)	<input type="checkbox"/> \$490		
* Financial Planning is not required for limited licence but it is recommended.				
Option 3. Financial Planner Level 1 package (4 subjects)				
DFP1A	Generic Knowledge exemption applies if Certified CA or CPA Designation is held)	<input type="checkbox"/> \$0		
	Generic Knowledge Generic Knowledge (IPA members only; membership certificate must be attached)	<input type="checkbox"/> \$220 <input type="checkbox"/> \$100		
DFP1B	Financial Planning	<input type="checkbox"/> \$270		
DFP2	Insurance and Risk Protection	<input type="checkbox"/> \$490		
ASP	Accountants' SMSF Package (includes Superannuation and SMSF)	<input type="checkbox"/> \$490		
DFP4	Securities and Managed Investments	<input type="checkbox"/> \$490		
Package	All subjects including DFP1, DFP2, ASP & DFP4	<input type="checkbox"/> \$1655		
TOTAL (individual subjects and packages)				\$
Completion of the Financial Planning Level 1 package will provide full RG146 accreditation				
Payment Options				
<input type="checkbox"/> Cheque (Please make cheque payable to Kaplan Education Pty Ltd).			Cheque No :	
<input type="checkbox"/> Credit card payment:		<input type="checkbox"/> Mastercard <input type="checkbox"/> Visa <input type="checkbox"/> AMEX (Additional 2.5% surcharge applies for AMEX payments only)		
Cardholder's name:		Cardholder's signature:		
Card number:				
Expiry date:		CVC Code:		Total \$

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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.

Additional Information (AVETMISS)

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?	<input type="checkbox"/> English only <input type="checkbox"/> Yes. Please specify:
How well do you speak English?	<input type="checkbox"/> Very well <input type="checkbox"/> Well <input type="checkbox"/> Not well <input type="checkbox"/> Not at all
Are you of Aboriginal or Torres Strait Islander origin?	<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?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If YES, then please indicate the areas of disability, impairment or long term condition. (You may include more than one.)	<input type="checkbox"/> Hearing/Deaf <input type="checkbox"/> Acquired brain impairment <input type="checkbox"/> Mental illness <input type="checkbox"/> Vision <input type="checkbox"/> Intellectual <input type="checkbox"/> Medical condition <input type="checkbox"/> Learning <input type="checkbox"/> Other <input type="checkbox"/> Physical
Schooling	
What is your highest COMPLETED school level? Please tick one box only.	<input type="checkbox"/> Never attended school <input type="checkbox"/> Year 10 or equivalent <input type="checkbox"/> Year 8 or below <input type="checkbox"/> Year 11 or equivalent <input type="checkbox"/> Year 9 or equivalent <input type="checkbox"/> Year 12 or equivalent
In which YEAR did you complete that school level?	
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"/> Certificates other than the above
Employment	Study Reason
Of the following categories, which BEST describes your current employment status (please tick ONE only): <input type="checkbox"/> Full-time employee <input type="checkbox"/> Part-time employee <input type="checkbox"/> Self employed - not employing others <input type="checkbox"/> Employer <input type="checkbox"/> Employed - unpaid work 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	Of the following categories, which BEST describes your main reason for undertaking this course? (please tick ONE only): <input type="checkbox"/> To get a job <input type="checkbox"/> To develop my existing business <input type="checkbox"/> To start my own business <input type="checkbox"/> To try for a different career <input type="checkbox"/> To get a better job or a promotion <input type="checkbox"/> It was required of my job <input type="checkbox"/> I wanted extra skills for my job <input type="checkbox"/> To get into another course of study <input type="checkbox"/> For personal interest or self-development <input type="checkbox"/> Other reasons