

SMSF Expert Pty Ltd

Accountant's Financial Planning qualifications

PROFESSIONAL

Kaplan Education Pty Ltd. ABN 54 089 002 371

Personal Information

Unique Student Identifier (USI)*	
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*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
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Title: Mr Mrs Ms Miss	Sex	Male Female
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First name:		Last name:	
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Email:		Date of birth:	
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Job title:		Organisation:	
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Telephone:	(w)	(h)	(m)
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Are you an authorised representative/employee of an AFS licensee? Yes No

Name of licensee:	
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Name of training manager:		Email	
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Company name (must be provided if you select a Business address as your delivery address):	
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Residential Address <small>(This is a requirement for government reporting purposes, please do not enter a PO Box address)</small>	Delivery Address Business Same as residential address <small>(must be the daytime delivery address that will be used for all correspondence)</small>
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Building/Property Name:	Building/Property Name:
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Flat/Unit Number:	Flat/Unit Number:
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Street Number:	Street Number:
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Street Name:	Street Name:
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Suburb:	Suburb:
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State:	State:
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Postcode:	Postcode:
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Country:	Country:
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Do you have any special needs that need to be taken into account to support your learning (e.g. language, literacy, access)?	No Yes please specify below:
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Terms of enrolment

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 2016** 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.

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.

Name:		Signature:	
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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)	\$0
DFP1B	Financial Planning*	\$270
ASP	Accountants' SMSF Package (includes Superannuation and SMSF)	\$490
Option 2. Accountant's Limited Licence (no exemption)		
DFP1A	Generic Knowledge (Non members of a recognised professional body) or Generic Knowledge (IPA members only; IPA membership certificate must be attached)	\$220
		\$100
DFP1B	Financial Planning*	\$270
ASP	Accountants' SMSF Package (includes Superannuation and SMSF)	\$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)	\$0
	Generic Knowledge	\$220
	Generic Knowledge (IPA members only; membership certificate must be attached)	\$100
DFP1B	Financial Planning	\$270
DFP2	Insurance and Risk Protection	\$490
ASP	Accountants' SMSF Package (includes Superannuation and SMSF)	\$490
DFP4	Securities and Managed Investments	\$490
Package	All subjects including DFP1, DFP2, ASP & DFP4	\$1655
TOTAL (individual subjects and packages)		\$
Completion of the Financial Planning Level 1 package will provide full RG146 accreditation		

Payment Options					
Cheque (Please make cheque payable to Kaplan Education Pty Ltd).				Cheque No :	
Credit card payment:		Mastercard	Visa	AMEX	(Additional 2.5% surcharge applies for AMEX payments only)
Cardholder's name:			Cardholder's signature:		
Card number:					
Expiry date:		CVC Code:		Total \$	

email to enrolments@kaplan.edu.au **mail to** GPO Box 9995, Sydney NSW 2001 **fax to** 1300 137 80

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?	Australia Other. Please specify:
Do you speak a language other than English at home?	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 - Torres Strait Islander Yes - Aboriginal
Disability	
Do you consider yourself to have a disability, impairment	or long-term health condition? Yes No
If YES, then please indicate the areas of disability, impairment or long term condition. (You may include more than one.)	Hearing/Deaf Mental illness Intellectual Learning Physical Acquired brain impairment Vision Medical condition Other
Schooling	
What is your highest COMPLETED school level? Please tick one box only.	Never attended school Year 10 or equivalent Year 8 or below Year 11 or equivalent Year 9 or equivalent 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: Yes No (If YES, then tick the appropriate boxes)	Certificate I Certificate II Certificate III (or trade certificate) Certificate IV (or advanced certificate/technician) Diploma (or associate diploma) Advanced Diploma or Associate Degree Bachelor Degree or Higher Certificates other than the above
Employment	Study Reason
Of the following categories, which BEST describes your current employment status (please tick ONE only): Full-time employee Part-time employee Self employed - not employing others Employer Employed - unpaid work in a family business Unemployed - seeking full-time work Unemployed - seeking part-time work Not employed - not seeking employment	Of the following categories, which BEST describes your main reason for undertaking this course? (please tick ONE 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 required 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