

Member code (if renewing)

--	--	--	--	--	--	--

Return completed application to our freepost address: School Plan Reply paid 62131 OAKLEIGH VIC 3166

School Plan details

Membership year	Preferred School Plan option:	Are you a member of the Australian Scholarships Group?
2 0 <input type="text"/> <input type="text"/>	School Plan <input type="checkbox"/> School Plan Plus <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>

Section 1: Your personal details

APPLICANT 1					
Title:	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Miss	<input type="checkbox"/> Ms	<input type="checkbox"/> Dr
Given name	Family name		Date of birth		
Driver's licence no. (attach a legible copy with current address)		Utility bill (attach a legible copy with current address)		Occupation/industry	
Employer (Business name)		ACN or ABN (if self-employed)		Employer's contact no.	
Residential address (required)			Suburb	State	Postcode
Home number	Work number	Mobile number	Email address		
Postal address (if same as residential write 'as above')			Suburb	State	Postcode
APPLICANT 2					
Title:	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Miss	<input type="checkbox"/> Ms	<input type="checkbox"/> Dr
Given name	Family name		Date of birth		
Driver's licence no. (attach a legible copy with current address)		Utility bill (attach a legible copy with current address)		Occupation/industry	
Employer (Business name)		ACN or ABN (if self-employed)		Employer's contact no.	
Residential address (required)			Suburb	State	Postcode
Home number	Work number	Mobile number	Email address		
Postal address (if same as residential write 'as above')			Suburb	State	Postcode

Section 2: School Plan Direct Debit Request

Customer Authority		Payment frequency:
Name of customer/s		
I/We	<input type="text"/>	Fortnightly <input type="checkbox"/>
You	School Plan Management Pty Ltd	Monthly <input type="checkbox"/>
Debit User ID 014746		
through the Bulk Electronic Clearing System (BECS) to debit the Nominated Account described in this direct debit request, on a fortnightly or monthly basis, with the amounts set out in the membership confirmation letter.		

Terms and conditions

1. This agreement only applies to school fees payable by you in respect of the year stated on the application form. A new application must be made for each school year. School Plan Management Pty Ltd (School Plan) reserves the right to change these terms and conditions from year to year.
2. If your application for membership is accepted, subject to these Terms and Conditions, School Plan will assume and discharge your obligation to pay school fees to your nominated school(s), up to the amount specified in our letter of confirmation. This letter will be sent to you when the school fees for the year have been verified with the school.
3. Members are required to pay two monthly instalments or an equivalent of two monthly instalments if the fortnightly payment option is chosen; before School Plan becomes obliged to discharge any part of their liability to a nominated school.
4. School Plan does not provide credit and is not liable to pay any amounts outstanding on a member's school account other than the fees for which it has accepted responsibility. Subject to conditions 5 and 7, School Plan undertakes to fully and completely indemnify you against any claim on you for those fees
5. Monthly calculated instalments are deducted on the first working day of each month with the exception of January, which will be deducted on the 15th of the month. Fortnightly instalments will be drawn on a fortnightly basis according to the nominated date proposed in your confirmation letter. If a member fails to make a monthly/fortnightly instalment, School Plan will be relieved of its obligation to pay the school fees for the member, until all outstanding instalments are brought up to date. It also reserves the right to recover any outstanding instalments which a member has failed to make.
6. Members are obliged to make the agreed instalments for the full year unless a written request for cancellation has been lodged with and accepted by School Plan during the year. Cancellation requests will only be accepted and effective where the value of the member's instalments paid to School Plan are equal to or greater than the amount of the school fees paid as at the date of the cancellation request. Any shortfall between the amount of the member's instalments paid and the amount of school fees paid as at that date, plus applicable service fees, must be reimbursed to School Plan before the request for cancellation will be accepted and effective. School Plan will promptly refund any excess instalments paid to the member following cancellation.
7. Where School Plan has accepted a request for cancellation, it shall have no further obligation to pay any further school fees outstanding on a member's school account.
8. School Plan takes no responsibility for errors made by a member's financial institution, in processing their monthly/fortnightly instalments.
9. School Plan in its absolute discretion reserves the right to reject an application for membership or cancel a membership at any time, without prior warning or explanation.
10. Any request by a member for a change in their fees to be funded must be made in writing to School Plan.
11. If a member's residential address, telephone number or employment change, the member is obliged to inform School Plan in writing or by contacting School Plan by phone, after the member's identity has been verified to the satisfaction of School Plan.
12. An application for membership can only be considered where at least one of the applicants is gainfully employed in a full-time occupation or is carrying on a business on a full-time basis. If an applicant becomes subsequently unemployed or unable to run his or her business, the member is obliged to inform School Plan within 14 days.
13. Membership is only available to Australian residents whose children, or children under their care, study at an Australian school. Non-residents whose children are studying in Australia are ineligible for membership.
14. Membership of School Plan does not entitle the member to any interest or otherwise in School Plan Management Pty Ltd, its parent company Australian Scholarships Group Friendly Society Limited or its associated entities and, for clarity, does not mean that the member is a member of any of those entities as defined in the constituent documents of those entities or under the Corporations Act 2001 (Cwth).

Privacy statement

Collecting Personal Information

The information requested on the Application Form and the Direct Debit Request Form contained in the brochure, constitutes the majority of the personal information that *School Plan* will collect from you during the application process. However, it may also be necessary to contact your school for the purpose of assessing your application and as the need may arise during the term of the contract. This information may be retained by *School Plan* even if the application is refused. If all questions on the application form are not fully answered, *School Plan* may not be able to assess your application properly.

The Purpose of Collection

The information you provide will be used to confirm your identity, as required by law, to assess your application for membership and to help *School Plan* provide benefits to you if your application is accepted.

The information is also:

- used to assess what you may need from the Australian Scholarships Group's range of benefits and services and to provide you with information about them
- collated to create statistical information, but only for internal use.

Disclosing Information to Other Organisations

The information *School Plan* collects from you may be disclosed:

- in the normal course of business
- to a Debt Collection Agency
- to authorised agents, associated organisations or any other organisation with whom *School Plan* has or forms a joint venture agreement.

School Plan undertakes to you:

- that it will not sell, rent or trade any of your personal information to any person
- that it will not disclose information about you to anyone else unless the disclosure:
 - is required by law
 - is authorised by law, or
 - you have consented to the disclosure.

Accessing your Personal Information

You can ask *School Plan*:

- to confirm whether or not it holds any of your personal information
- to provide you with access to all readily retrievable personal information that it holds about you.

If *School Plan* is able to, it will give you that access. If *School Plan* refuses your request for access it will give you the reason for that refusal.

Correcting Personal Information

If *School Plan* has any personal information about you which is incorrect or out of date, you can ask *School Plan* to correct that information free of charge.

Changes to Privacy Statement

This Privacy Statement is not a static document and therefore *School Plan* may make changes to it at any time for any reason. *School Plan* will publish these changes on our website.

Further Information

If you would like further information about the contents of this privacy statement or if you think *School Plan* has breached any promise made in this statement, please contact our office.

Customer DDR Service Agreement

Our Commitment to You

This document outlines our service commitment to you, in respect of the Direct Debit Request (DDR) arrangements made between School Plan Management Pty Ltd Debit User ID 014746 and you. It sets out your rights, our commitment to you and your responsibilities to us, together with where you should go for assistance.

Initial Terms of the Arrangement

In terms of the Direct Debit Request arrangements made between us and signed by you, we undertake to periodically debit your nominated account for the agreed amount, for the required monthly/fortnightly instalment.

Drawing Arrangements

- The first drawing under this Direct Debit arrangement will occur on the date stated in the membership confirmation letter.
- If any drawing falls due on a non-business day, it will be debited from your account on the next business day following the scheduled drawing date. If you are unsure when the debit will be processed on your account, you may also contact your financial institution.
- We will give you at least 14 days notice in writing when changes to the initial terms of the arrangement are made. This notice will state the new amount, next drawing date and any other changes to the initial terms.
- If you wish to discuss any changes to the initial terms, please contact our School Plan Customer Service Team on 1800 337 419.

Changes to the Arrangement

If you want to make changes to the drawing arrangements, contact the School Plan Customer Service Team on the phone number stated above.

These changes may include:

- deferring the debit arrangement
- altering the scheduled amount
- stopping an individual debit
- suspending the DDR
- cancelling the DDR.

Enquiries

Direct all enquiries to us, rather than to your financial institution. These should be made at least 3 working days prior to the next scheduled drawing date. All communication addressed to us should include your member code. You may contact your financial institution for stops or cancellations.

Disputes

- If you believe that a drawing has been initiated incorrectly, we encourage you to take the matter up directly with us by contacting the School Plan Customer Service Team on the number above during business hours.
- If you do not receive a satisfactory response from us to your dispute, contact your financial institution who will respond to you with an answer to your claim:
 - (i) within 7 business days (for claims lodged within 12 months of the disputed drawing), or
 - (ii) within 30 business days (for claims lodged more than 12 months after the disputed drawing)
- You will receive a refund of the drawing amount if we can not substantiate the reason for the drawing. Allow for 14 days for the amendments to take effect or to respond to a dispute.

If our investigations show that your account has been incorrectly debited, we will arrange for the financial institution to adjust your account accordingly. We will also notify you in writing of the amount by which your account has been adjusted. If, following our investigations, we believe on reasonable grounds that your account has been correctly debited, we will respond to your query by providing you with reasons and copies of any evidence for this finding.

If we cannot resolve the matter, you can still refer it to your financial institution, which will obtain details from you of the disputed payment and may lodge a claim on your behalf.

Note: Your financial institution will ask you to contact us to resolve your disputed drawing prior to involving them.

Your Commitment to Us

It is your responsibility to ensure that:

- your nominated account can accept direct debits (your financial institution can confirm this), as direct debiting through the Bulk Electronic Clearing System (BECS) may not be available on all accounts
- on the drawing date there is sufficient cleared funds in the nominated account
- you advise us if the nominated account is transferred or closed
- you should check account details against a recent statement from your financial institution. If you are uncertain how to complete the DDR, you should contact your financial institution.

If your drawing is returned or dishonoured by your financial institution, a letter will be sent requesting payment to be made within 7 days, together with a \$20 Administration Fee.

Privacy

The information on your account details you provide will be used to enable us to debit your account. It will also be used in connection to claims relating to incorrect debits. The information will be used for internal purposes only. For further information on our privacy policy please see our full privacy statement in the Membership Guide or alternatively contact us on 1800 337 419.