



# Enrolment Form

Business Advisory Certification & Modules  
(Includes Nationally Recognised Units of Competency)

Version: 3 | Date: 22/02/2024

<b>OFFICE USE ONLY</b>	Enrolment number:	Click here to enter text.	Date of enrolment:	Click here to enter text.
	Student number:	Click here to enter text.	Enrolment Coordinator:	Benjamin Jack
	Date of Cancellation:	Click here to enter text.	Cancelled by:	Click here to enter text.
<b>PERSONAL DETAILS</b>				
Last Name	Click here to enter text.			
Given Name/s	Click here to enter text.	Title	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Dr <input type="checkbox"/> Not specified Other _____	
Date of birth	Click here to enter text.	Gender (please tick)	<input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Not specified	
Country of birth	Click here to enter text.	City of Birth	Click here to enter text.	
Age declaration	<input type="checkbox"/> I am OVER 18 years of age <input type="checkbox"/> I am UNDER 18 years of age			
Town/City of birth	Click here to enter text.			
Phone	Click here to enter text.	Mobile	Click here to enter text.	
Email address	Click here to enter text.			
Residential address	Click here to enter text.			
Suburb	Click here to enter text.			
State	Click here to enter text.	Postal code	Click here to enter text.	
Postal address (if different from above)	Click here to enter text.			
Suburb	Click here to enter text.			
State	Click here to enter text.	Postal code	Click here to enter text.	
<b>EMPLOYMENT</b>				
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 – no employees <input type="checkbox"/> Employer				
<input type="checkbox"/> Employed - unpaid worker in 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				
<b>EDUCATION AND TRAINING</b>				
What is your highest COMPLETED school level? (please tick one 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?				Click here to enter text.
<b>PRE-REQUISITE ENTRY REQUIREMENTS</b>				
To enrol in this course, you are required to meet the minimum entry requirements. Please tick all that applies to you:				
<input type="checkbox"/> at least 1 yr experience in any of the following fields:				
<input type="checkbox"/> more than 3 yrs experience in any of the following fields:				
<ul style="list-style-type: none"> <li>• Accountant / Bookkeeper</li> <li>• Business Manager / Business Owner</li> <li>• Wealth &amp; Financial Planner</li> <li>• Business Broker/ M&amp;A</li> </ul>				



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When did you last practice above described experience?	Click here to enter text.										
<b>PREVIOUS QUALIFICATIONS ACHIEVED</b>											
Have you SUCCESSFULLY completed any of the following qualifications?	<input type="checkbox"/> Yes <input type="checkbox"/> No										
<p>If YES, then tick any applicable boxes:</p> <table border="0"> <tr> <td><input type="checkbox"/> Bachelor Degree or Higher Degree</td> <td><input type="checkbox"/> Cert III (or Trade Cert)</td> </tr> <tr> <td><input type="checkbox"/> Advanced Diploma or Associate Diploma</td> <td><input type="checkbox"/> Cert II</td> </tr> <tr> <td><input type="checkbox"/> Diploma (or Associate Diploma)</td> <td><input type="checkbox"/> Cert I</td> </tr> <tr> <td><input type="checkbox"/> Cert IV (or Advanced Cert/Technician)</td> <td><input type="checkbox"/> Other Certificates</td> </tr> </table>		<input type="checkbox"/> Bachelor Degree or Higher Degree	<input type="checkbox"/> Cert III (or Trade Cert)	<input type="checkbox"/> Advanced Diploma or Associate Diploma	<input type="checkbox"/> Cert II	<input type="checkbox"/> Diploma (or Associate Diploma)	<input type="checkbox"/> Cert I	<input type="checkbox"/> Cert IV (or Advanced Cert/Technician)	<input type="checkbox"/> Other Certificates		
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<input type="checkbox"/> Cert IV (or Advanced Cert/Technician)	<input type="checkbox"/> Other Certificates										
<b>REASON FOR STUDY</b>											
Of the following categories, which BEST describes your main reason for undertaking this Course/Traineeship/apprenticeship? (please tick one only)											
<table border="0"> <tr> <td><input type="checkbox"/> To get a job</td> <td><input type="checkbox"/> It was a requirement of my job</td> </tr> <tr> <td><input type="checkbox"/> To develop my existing business</td> <td><input type="checkbox"/> I wanted extra skills for my job</td> </tr> <tr> <td><input type="checkbox"/> To start my own business</td> <td><input type="checkbox"/> To get into another course of study</td> </tr> <tr> <td><input type="checkbox"/> To try for a different career</td> <td><input type="checkbox"/> For personal interest or self-development</td> </tr> <tr> <td><input type="checkbox"/> To get a better job or promotion</td> <td><input type="checkbox"/> Other reasons</td> </tr> </table>		<input type="checkbox"/> To get a job	<input type="checkbox"/> It was a requirement of my job	<input type="checkbox"/> To develop my existing business	<input type="checkbox"/> I wanted extra skills for my job	<input type="checkbox"/> To start my own business	<input type="checkbox"/> To get into another course of study	<input type="checkbox"/> To try for a different career	<input type="checkbox"/> For personal interest or self-development	<input type="checkbox"/> To get a better job or promotion	<input type="checkbox"/> Other reasons
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<input type="checkbox"/> To get a better job or promotion	<input type="checkbox"/> Other reasons										
<b>LANGUAGE AND CULTURAL DIVERSITY</b>											
In which country were you born? (please tick one)											
<input type="checkbox"/> Australia <input type="checkbox"/> Other (please specify): Click here to enter text.											
What is your current citizenship status (please tick one)											
<input type="checkbox"/> Australian citizen <input type="checkbox"/> Permanent resident <input type="checkbox"/> New Zealand resident <input type="checkbox"/> Temporary Visa Holder											
<p style="text-align: center;"><b>IMPORTANT NOTICE:</b></p> <p style="text-align: center; color: red;">If you are an international student on a student visa, enrolling with a non-CRICOS registered provider is a breach of your visa conditions. <i>Please note that Institute of Advisors is NOT a CRICOS provider.</i></p> <p style="text-align: center; color: red;">Breach of your visa conditions may result to cancellation of your visa status. Institute of Advisors is not responsible for ensuring your eligibility to undertake study in Australia.</p>											
Are you of Aboriginal or Torres Strait Islander origin? (please tick one)											
<input type="checkbox"/> No <input type="checkbox"/> Yes, Aboriginal <input type="checkbox"/> Yes, Torres Strait Islander											
Do you speak a language other than English at home? (please tick one)											
<input type="checkbox"/> No, English only <input type="checkbox"/> Yes, other (please specify)" Click here to enter text.											
How well do you speak English? (please tick one)											
<input type="checkbox"/> Very well <input type="checkbox"/> Well <input type="checkbox"/> Not well <input type="checkbox"/> Not at all											
<b>DISABILITY</b>											
Do you consider yourself to have a disability, impairment or long-term condition? <input type="checkbox"/> Yes <input type="checkbox"/> No											
<p>If YES, please indicate below the areas of disability, impairment or long-term condition: (please tick - you may indicate more than one area)</p> <p>If NO, please skip section</p> <table border="0"> <tr> <td><input type="checkbox"/> Hearing/Deaf</td> <td><input type="checkbox"/> Physical</td> <td><input type="checkbox"/> Intellectual</td> </tr> <tr> <td><input type="checkbox"/> Medical condition</td> <td><input type="checkbox"/> Mental Illness</td> <td><input type="checkbox"/> Vision</td> </tr> <tr> <td><input type="checkbox"/> Acquired brain impairment</td> <td><input type="checkbox"/> Learning</td> <td><input type="checkbox"/> Other: Click here to enter text.</td> </tr> </table>		<input type="checkbox"/> Hearing/Deaf	<input type="checkbox"/> Physical	<input type="checkbox"/> Intellectual	<input type="checkbox"/> Medical condition	<input type="checkbox"/> Mental Illness	<input type="checkbox"/> Vision	<input type="checkbox"/> Acquired brain impairment	<input type="checkbox"/> Learning	<input type="checkbox"/> Other: Click here to enter text.	
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<i>If others please specify and provide details:</i>	Click here to enter text.		
<b>Do you require extra assistance to complete your training?</b>		<input type="checkbox"/> Yes	<input type="checkbox"/> No
<i>If YES please specify assistance needed:</i>	Click here to enter text.		
<b>TRAINING AND ASSESSMENT, RECOGNITION OF PRIOR LEARNING AND CREDIT TRANSFER</b>			
NRT – Nationally Recognised Training		IOA – Institute of Advisor Unit	
<b>Units of Competency (code and title)</b>		<b>Training &amp; Assessment</b>	<b>RPL</b>
<b>10889NAT Diploma of Business Advisory</b>		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
<b>UNIQUE STUDENT IDENTIFIER (USI)</b>			
<p>A Unique Student Identifier (USI) is a reference number made up of numbers and letters that gives students access to their USI account. A USI will allow an individual's USI account to be linked to the National Vocational Education and Training (VET) Data Collection allowing an individual to see all of their training results from all providers including all completed training units and qualifications. <b>For more details please refer to "Unique Student Identifier (USI)"</b> <a href="https://www.usi.gov.au/">https://www.usi.gov.au/</a>.</p>			
<b>USI Reference Number:</b>		Click here to enter text.	
<p>If you don't have a USI number, please apply for your USI number directly from the <b>Student Identifiers Registrar</b> website <a href="http://www.usi.gov.au">http://www.usi.gov.au</a> and provide it to Institute of Advisors within 14 days.</p> <p style="color: red;"><b>Please note that Institute of Advisors will not issue you a certificate without verifying your USI.</b></p>			
<b>PAYMENT OPTIONS</b>			
<b>PLEASE SELECT YOUR PREFERENCE</b>			
<p>Please select your method of payment. Separate correspondence will be issued based on your selection. The Diploma fee is spread over 6 monthly payments of \$916.66.</p>			
<ul style="list-style-type: none"> <li><input type="checkbox"/> Electronic funds transfer (EFT) – We will supply our bank details to you and an invoice will be issued.</li> <li><input type="checkbox"/> Invoice Required – We will issue an invoice to you in your name.</li> <li><input type="checkbox"/> Invoice Required – We will issue a corporate Invoice specifying terms and conditions.</li> <li><input type="checkbox"/> Credit Card - We will send to you a secure payment link and then auto process your credit card over 6 months</li> </ul>			
			<hr style="width: 20%; margin-left: auto;"/> Date and Signature

## TERMS & CONDITIONS OF ENROLMENT

### Your Contract with Institute of Advisors

I hereby apply to enrol in the course as indicated on the Enrolment Form and agree that I will pay Institute of Advisors all tuition fees and other charges due for my course. I agree to abide by the following terms and conditions of enrolment. Any variation of the terms and conditions of the Contract must be in writing and be signed by an authorised officer of Institute of Advisors.

### Your Name must be Correct

Institute of Advisors must have the correct name. Show documentary evidence (declaration from a lawyer, marriage certificate, etc.) if any of your official documents (birth certificate, mark sheets, etc.) show a name which is different from the one that you have used on this application form.

### Contact Details

Your current home address must be provided along with phone number and email address (if any).

### LLN / ACSF Assessment

All students must complete the LLN assessment provided by Institute of Advisors and consider corresponding advice accordingly. Institute of Advisors reserves the right to defer enrolment should it find that the student's LLN skill level will not allow the student to undertake the course.

## Credit Transfer and Recognition of Prior Learning

Institute of Advisors offers recognition, where applicable, to students who hold prior relevant and sufficient training and/or work experience. Speak with your enrolment coordinator for more information.

## Our commitment to provision of quality courses

- Institute of Advisors is responsible for the quality of the training and assessment in compliance with the current Standards for RTOs, and for the issuance of the AQF [Australian Qualifications Framework] certification documentation
- Institute of Advisors is responsible for processing complaints and appeals according to its policies and procedures
- Institute of Advisors is responsible for providing refunds according to its Fees and Payments Policy and Procedures
- Institute of Advisors is responsible for providing students:
  - student support services;
  - facilities and equipment and staff;
  - course materials and assessments;
  - education and learner support ;

## Payment of Tuition Fees

The fees are payable prior to start of the course. If the student does not pay the fees by the due date, a late fee may be charged and you may lose your place in the course. Institute of Advisors reserves the right to review its fees without notice. Students should check the fee details prior to payment.

## Administrative Fees (GST inclusive)

Resource Fees are specific to each course specified.	
Late pay tuition fee – 7 days	\$50
Late pay tuition fee – 14 days	\$75
Re-enrolment fee	\$500
Cancellation and course variation fee	\$250
RPL fee per unit	\$150
Credit transfer fee per unit	\$50
Assessment re-sit	\$250
Any official letter from Institute of Advisors	\$20
Re-issue of final documents	\$100

## Course Fees Breakdown

Enrolment fees are non-refundable.

Online course & resource fees are only debited from your account upon the release of the resources. You will receive an email confirmation with access to the online course and resources, including confirmation of the debited amount.

Assessment fee is non-refundable once you have commenced the course. Course commencement is indicated on your enrolment form.

Course	Total Fee	Enrolment fee (Non-refundable)	Online course & Resource Fee	Student Support Assessment Fee
General Payment Information	See Course schedule below	Paid upon enrolment	Debited upon release of	Paid upon enrolment

			course resources	
General Refund Information	See schedule	Non-refundable	Non-refundable upon release of resources	Non-refundable once the course commenced
CPBA Course	\$2750	200	\$2,000	\$550
Exit & Succession Course	\$1750	150	\$1,000	\$350
Diploma of Business Advisory Course	\$5,500	200	\$4,200	\$1300

## Outstanding Student Fees

- Non-payment of fees by the due date for continuing enrolments will result in suspension of training. Institute of Advisors will notify all parties in writing of suspension. Once payment has been finalised, parties will be notified of the recommencement of training.
- Institute of Advisors will charge a recommencement fee for any suspended training to cover administration cost.
- Institute of Advisors will not issue SOAs or Certificates if training fees are outstanding.
- Institute of Advisors will inform students of its process for the recovery of outstanding student fees prior to enrolment through the Fee Administration and Refund Policy.

## Refund Policy Principles

- Details of Institute of Advisors Refund Policy are publicly available to prospective students and employers (if applicable), staff and existing students and employers (if applicable).
- Institute of Advisors will make students aware of the refund policy prior enrolment.
- With regard to all withdrawal of training, Institute of Advisors will first encourage a client to continue training or provide other options such as enrolling to another course date, prior to processing refund applications.
- All refund requests made to Institute of Advisors must be done in writing via the Refund Request Form. Institute of Advisors will only acknowledge, and review requests based on information provided through the form. Exemptions are made to mitigating circumstances, provided there is supporting evidence.
- No refunds will be issued for cancellations outside of the Refund Period.
- For refund applications within the Refund Period, the Refund Request Form must be received by Institute of Advisors, within the Refund Period. A refund of the course fee, less the applicable Administrative Fees will only be issued if all above criteria have been met and the student has no previous outstanding monies with Institute of Advisors.
- Institute of Advisors requires written notification of withdrawal from training; this may be via letter, email or the completion of the Withdrawal from Training Form. Refund will be assessed upon receipt of the request. Statement of fees that includes all fees applied and any fees refunded (if applicable) will be provided where a student withdraws from training.
- Institute of Advisors will process refund requests within 1 week from the day of receipt. The reimbursement procedure may take up to 4 weeks.
- Institute of Advisors will charge an Administration Fee of \$200 to cover administration costs.
- All refunds will be paid to the person or organisation that originally paid the fees.
- Institute of Advisors does not provide refund where:
  - (1) A client has commenced their course
  - (2) Student leaves before full course completion and does not complete qualification after assessment

(3) Recognition resources and services have been supplied to the client.

- Institute of Advisors may provide consideration for refund for students who have commenced training with the discretion of the CEO/Manager.
- Institute of Advisors does not accept liability for loss or damage suffered in the event of withdrawal from a course by a client.
- Institute of Advisors provides a full refund to all clients, should there be a need for Institute of Advisors to cancel a course. In the first instance Institute of Advisors will (where possible) provide an opportunity for the client to attend another scheduled course. If Institute of Advisors cancels a course, clients do not have to apply for a refund; Institute of Advisors will process the refunds automatically.
- Refunds for cancellation of enrolments and other conditions are granted based on the refunds table in the annex of this policy.

### 10.3 Review of Tuition Fees

Institute of Advisors reserves the right to review its fees and charges. If tuition fees are changed you will be required to pay the new fees from the commencement of the next semester. If you defer your course, you will be required to pay the fees applicable at your new commencement date.

#### How to claim a refund

To claim any refund, you must complete a Refund Application Form and return together with your receipt of course fees and certified copies of any supporting documents to Institute of Advisors. The refund will be paid in Australian dollars & you will be provided with a letter explaining how the refund was calculated. It will be emailed to you within 14 days from the receipt of the Refund Application form.

The above refund policy does not remove your right to take action under Australia's consumer protection laws. Also, the Institute of Advisors appeals resolution processes do not circumscribe the student's right to pursue legal remedy. See Refund Policy for complete details.

#### Institute of Advisors Refunds Table

- Institute of Advisors Refunds for enrolments are subject to the following refund formula.
- "Refund Period" – 7 calendar days from the enrolment date, except where the student has already commenced the course.
- Refund is not available if the student has accessed the course.

Refund Type	Description	Notification Requirements	Processing Fees	Refund
Enrolment cancellation / withdrawal from training within the "refund period"	-For all courses where the student has not accessed the course.	-In writing, within the refund period	\$200 administration and processing fee	-Full refund less the non-refundable enrolment fee and the refund administration and processing fee -Future payments may be cancelled for students under payment plans
Withdrawal from Course beyond the refund period "Withdrawal outside the refund period"	Withdrawal from Training - for all individual units commenced/attended/completed within the qualification /Accredited course	-In writing, any day beyond the "refund period"	\$200 administration and processing fee	-No refund or -In some cases upon the discretion of the Institute of Advisors, the calculated refund less the non-refundable enrolment fee and the refund administration and processing fee

Refund Type	Description	Notification Requirements	Processing Fees	Refund
RPL / Credit Transfer	Where recognition of prior learning and/or credit transfer has been granted after enrolment	N/A	\$200 administration and processing fee	-No refund
Course Cancellation	Cancellation of a course by Institute of Advisors (for any reason)	\$200		Full refund or enrolment to a different qualification
Withdrawal – "not of their own accord"	Where training ceased due to RTO closure	N/A		Full refund or referral to a different service provider

#### Acceptable Behaviour, Attendance and Academic Progress

Admission, if granted, is subject to the student maintaining continuous academic progress through the course. There is an intervention policy to support students and a series of warnings so you know your progress. Students need to progress well in order to continue to be enrolled in the course. You must agree to meet the requirements of your course and to abide by the rules and regulations of Institute of Advisors, including those for attendance and course progress, where relevant.

You agree that if you breach any of Institute of Advisors rules or your behaviour is deemed unacceptable by the RTO, your enrolment may be cancelled and you may not be entitled to any refund of the tuition fees or other charges paid to Institute of Advisors under the Contract.

#### Assessment Procedure

Assessments are part of every course and will vary depending on the type of the unit or course. A student must perform satisfactorily to complete the course requirements of every unit.

#### Information regarding Disability

If you have a disability, relevant information is requested to establish whether you require the provision of additional services or facilities not required by students who do not have a disability.

After consideration of your requirements, if the provision of these services or facilities would impose "unjustifiable hardship", for example, a very high cost on Institute of Advisors, your enrolment may be refused or additional fees may apply. You will be advised in writing of our decision.

The provision of additional services or facilities should not be seen as a guarantee of successful completion of a course. Institute of Advisors reserves the right to terminate a student's enrolment if the provision of reasonable adjustment is unsuccessful and further provision of services or facilities is determined as unjustifiable hardship.

#### LL&N Support

Institute of Advisors is committed to providing LL&N (Language, Literacy and Numeracy) support to students who may require it during their enrolment. These students may include those from linguistically and/or culturally diverse backgrounds, students with a disability and students whose first language is not English. For Institute of Advisors to best accommodate students, we ask that every student complete the enrolment interview and LLN assessment.

#### Student's Rights

Your rights and obligations and Institute of Advisors obligations, policies and procedures are set out in the Student handbook and the website. There is a complaints process if you have a grievance. If the student is dissatisfied with the decisions of Institute of Advisors after following the complaints and appeals procedures, you may seek independent external. The terms and conditions of enrolment as stated above do not remove the right of the



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student to take action under Australia's consumer protection laws. Also, Institute of Advisors dispute resolution processes do not circumscribe the student's right to pursue legal remedy.

## Access to Student's Details

Information provided by the student may be made available to Commonwealth and State agencies.

The primary purpose in collecting your information is to fulfil our business commitments to you in providing education and training. We may use the information you provide to help improve the services we deliver to you, measure interest in our services, inform you of other products and services or to comply with requirements under the law. We shall not otherwise disclose your personal information to any other party without your consent and we do not sell personal information to third parties. More information can be found on the Privacy Policy and Student Handbook.

## Disclaimer

Institute of Advisors does not represent or guarantee that the student will:

- Be accepted for enrolment at Institute of Advisors
- Successfully complete studies undertaken
- Gain entry into further tertiary studies.
- Institute of Advisors accepts no liability for any unexpected interruption in services through events such as staff strikes, electrical failure, floods and other.

## Breach of Terms & Conditions

Any breach of terms and conditions may result in the termination of the student's enrolment.

## Personal information & privacy protection statement

Personal information you supply and consent to being contacted about is to be used by Institute of Advisors in connection with an application for a student to study in Institute of Advisors. Provision of information is voluntary but, if not provided, the application may be hindered. Institute of Advisors will not disclose personal information to outside parties, other than as provided in the application form, unless required by law, you consent or it is needed to prevent serious threat to a person's health or safety. You can access and correct your personal information by contacting Institute of Advisors. The personal information you provide for this application will be protected in accordance with the Privacy Policy and Privacy legislation. You have a right to access and correct any personal information concerning you held by the RTO in the student and financial databases. As required by law and our registration standards, personal information may be shared between Institute of Advisors and the Australian Government and designated authorities and, if relevant, the Tuition Protection Scheme. By signing this application, it is understood that you have read this statement and agree to the use and disclosure of your personal information as outlined above. For full details please see Student Handbook.

## Student / Parents/ Guardian Declaration and Signature:

- I/We declare that all information provided with this application form is correct and that I/we have read and understand and agree to be bound

by the Terms and Conditions relating to this application (including Cancellation, Fees and Payments, and Complaints policies).

- I/We agree that in the event that false, inaccurate or misleading information is provided, Institute of Advisors reserves the right to cancel the enrolment.
- I/We agree to pay the applicable tuition fees set out by Institute of Advisors prior to the commencement and subsequent semesters of the nominated studies by the due dates. Additionally I/we agree to be jointly or severally liable to the debt arising from fees owing.
- I/We agree that when I/the student am/is accepted for enrolment in Institute of Advisors, I/we must comply with and ensure that the student complies with the terms and conditions of enrolment.
- I/We hereby consent to being contacted in connection with this application and any subsequent enrolment by text message, email or other electronic means and note that I/we may, at any time, opt out of being contacted by any such electronic means by contacting Institute of Advisors and so advising.
- I/We agree that if there is any difference in meaning of provisions of the English version and any translated version of this form or the terms and conditions provided to me/us, the English version is to prevail. This application must be signed and dated.

## Student Declaration

**By signing this form, I declare that prior to enrolling to the course, I have read and understood the entry and course requirements, along with other relevant course information in the website. I have read the student handbook including the Fees, Payments, Cancellations and Refunds Policy, and other policies and procedures prior to enrolling.**

Signed:

Date:

## Office Use Only

Date received:

Received and Processed by:

Comments:

*Institute of Advisors reserves the authority to change above terms and conditions without prior notice.*

*Please visit our website for details information about: Course information, course fee, privacy policy, information on disability and other relevant informat*