



School Plan Direct Debit Request

School Plan Management Pty Ltd ABN 70 006 832 408 **Head Office** 23-35 Hanover Street Oakleigh VIC 3166
Phone 1800 337 419 **Fax** (03) 9530 9892 **Email** schoolplan@asg.com.au **Website** www.schoolplan.com.au
School Plan is a wholly-owned subsidiary of the Australian Scholarships Group



Authority to direct debit your bank, building society or credit union account

I/We request School Plan Management Pty Ltd (User ID 014746) to debit my/our instalments on a monthly basis (commencing on the date stated in the membership confirmation letter) from my/our nominated account according to the details specified below.

Name of financial institution where account is held

Address of financial institution

Account in the name(s) of

BSB Number

Account Number

Signature 1

Print name

Date

/

/

Signature 2

Print name

Date

/

/

If debiting from a joint bank account both signatures are required.

Proof of ID (eg copy of driver's licence or passport) to be provided if payee other than applicant.

Authority to Direct Debit My Credit Card*

***Only available to School Plan Plus Members**

Credit Card number

Expiry date

/

Mastercard

Visa

Amex

Card holder name

Signature of Card holder



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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 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 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.
- 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:

- altering the scheduled amount; or
- stopping an individual debit; or
- suspending 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.

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 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.

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); and
- on the drawing date there is sufficient cleared funds in the nominated account; and
- you advise us if the nominated account is transferred or closed.

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.



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PRIVACY POLICY

Collecting Personal Information

The information requested on the Application Form and the Direct Debit Request Form, 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, and
- 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

Assessing 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.