



# School Plan Renewal Application Form

**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 DETAILS

Member Code       Year  2  0

Preferred *School Plan* option *School Plan*  *School Plan Plus*

Use same direct debit details as previous year? Yes  No   
(If no, please complete and return the direct debit request form overleaf)

## APPLICANT DETAILS

This application cannot be processed unless names and signatures of parent/s or guardian/s are provided.

**APPLICANT 1** Dr  Mr  Mrs  Ms  Miss

First name  Surname

Home phone no.  Mobile phone no.   
( )

Date of birth  /  /  Driver's licence no.

Occupation

Employer name & location  ACN/ABN (if self-employed)

Suburb  State  P/code

Employer's phone no.  Are you a Member of the Australian Scholarships Group? Yes  No   
( )

**APPLICANT 2** Dr  Mr  Mrs  Ms  Miss

First name  Surname

Home phone no.  Mobile phone no.   
( )

Date of birth  /  /  Driver's licence no.

Occupation

Employer name & location  ACN/ABN (if self-employed)

Suburb  State  P/code

Employer's phone no.  Are you a Member of the Australian Scholarships Group? Yes  No   
( )

## ADDRESS DETAILS

Residential address

Suburb  State  P/code

Postal address (if different to residential address)

Suburb  State  P/code

Email Address

## CHILD/SCHOOL DETAILS

**CHILD 1** Male  Female  Year level\*

First name  Surname

Name of school  Suburb

Amount (% or \$)

Does your child receive a Scholarship or Bursary?

Are there any boarding costs you would like *School Plan* to fund? Yes  No

Are there any non-compulsory fixed payments (e.g. building fund donations, camp fees, extra curricular activities) you would like *School Plan* to cover? (if yes, please attach supporting documentation from the school, e.g. invoice) Yes  No

**CHILD 2** Male  Female  Year level\*

First name  Surname

Name of school  Suburb

Amount (% or \$)

Does your child receive a Scholarship or Bursary?

Are there any boarding costs you would like *School Plan* to fund? Yes  No

Are there any non-compulsory fixed payments you would like *School Plan* to cover? (if yes, please attach supporting documentation from the school, e.g. invoice) Yes  No

**CHILD 3** Male  Female  Year level\*

First name  Surname

Name of school  Suburb

Amount (% or \$)

Does your child receive a Scholarship or Bursary?

Are there any boarding costs you would like *School Plan* to fund? Yes  No

Are there any non-compulsory fixed payments you would like *School Plan* to cover? (if yes, please attach supporting documentation from the school, e.g. invoice) Yes  No

\* year level your child will be in when the *School Plan* service is to apply

## STATEMENT AND DECLARATIONS

I/We further declare that I/we have read and understood the **terms and conditions of membership** and the **privacy statement**, as set out in the **Membership Guide**. By completing and returning this form to *School Plan*, at the address above, I/we consent to *School Plan* contacting me/us via my/our telephone number.

Signature 1

Print name  Date  /  /

Signature 2

Print name  Date  /  /

## OFFICE USE ONLY

### Acceptance by School Plan Management Pty Ltd

School Plan Management Pty Ltd accepts your application subject to the terms and conditions in the Membership Guide, and will pay the annual fees as stated in our letter of confirmation when they fall due, in return for you agreeing to pay the monthly instalments.

..... / ..... / .....  
for School Plan Management Pty Ltd Date



# School Plan Direct Debit Request

**School Plan Management Pty Ltd** ABN 70 006 832 408 **Head Office** 23-35 Hanover Street Oakleigh VIC 3166  
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## 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



# School Plan

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## 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 reserves the right to change these terms and conditions from year to year.
2. If your application for membership is accepted, *School Plan* Management Pty Ltd 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 instalments** before *School Plan* Management Pty Ltd becomes obliged to discharge any part of their liability to a nominated school.
4. *School Plan* Management Pty Ltd 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 condition 5, *School Plan* Management Pty Ltd undertakes to fully and completely indemnify you against any claim on you for those fees.
5. Instalments are deducted on the first working day of each month with the exception of January, which will be deducted in the middle of the month. If a member fails to make a monthly instalment, *School Plan* Management Pty Ltd 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* Management Pty Ltd during the year.
7. *School Plan* Management Pty Ltd takes no responsibility for errors made by a member's financial institution, in processing their monthly instalments.
8. *School Plan* Management Pty Ltd 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.
9. Any request by a member for a change in their fees to be funded must be made in writing to *School Plan* Management Pty Ltd.
10. If a member's residential address, telephone number or employment details subsequently change, the member is obliged to inform *School Plan* Management Pty Ltd in writing.
11. 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* Management Pty Ltd within 14 days.
12. 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.



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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.