

SMSF Personal Advice Enrolment Form/Invoice

This course is designed for practicing accountants or people who have been working in a financial support role for a minimum of two years within the last five years and have prior basic SMSF knowledge. It will prepare you for RG146 accreditation in SMSF, superannuation and generic knowledge.

Once this form is completed, email to enrolments@pinnacle.edu.au so we can finalise your booking. Please note, this form will serve as your tax invoice upon payment. Please keep a copy for your tax records. These fees are GST-free.

Personal Information

First name: Middle name: Last name:

Postal Address:
State: Postcode:

Residential Address:
(street address only) State: Postcode:

Email Address:
Land Line Number: Mobile Number:

Sex: Male: Female: Date of Birth: ___ / ___ / ___ Existing Student: Yes: No:

NTAA Member No.: In which country were you born?

Unique Student Identifier (USI):
If you don't have a USI, (visit www.usi.gov.au) USI must be provided at the time of enrolment

Recognition of Prior Learning

- Are you applying for Exemption for Chapter 1? Please attach your current CPP and/or current receipt
- Are you applying for additional Recognition? We will contact you

Accountants' RG 146 Compliance Solution (Accountants' Exemption)

SMSF Personal Advice Workshop Solution

City	Workshop Dates	Workshop Time
Melbourne <input type="checkbox"/>	12th & 13th September	9:00am to 5:00pm - please arrive at 8:30am for the 9:00am start.
Sydney <input type="checkbox"/>	12th & 13th September	Complimentary lunch from 12.30pm to 1.30pm
Brisbane <input type="checkbox"/>	14th & 15th September	

NTAA Member Cost	NTAA ADVICE Member or NTAA Member Registered for a Future NTAA Seminar	Non-NTAA Member Cost
\$1,500	\$1,350	\$1,700

MELBOURNE	SYDNEY	BRISBANE
Cliftons Lvl 1, 440 Collins St, Melbourne VIC 3000	Cliftons Lvl 13, 60 Margaret St, Sydney NSW 2000	Cliftons Lvl 3, 288 Edward St, Brisbane QLD 4000

Additional Information (Dietary requirements etc.)

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Additional Information

As a Registered Training Organisation (RTO), Pinnacle Financial Services Academy is required to comply with the Australian Vocational Education and Training Management Information Statistical Standard (AVETMISS), a nationally agreed set of rules that facilitates the collection of consistent and accurate information on the vocational education and training (VET) sector. Please complete the following questionnaire. All information provided will be treated in accordance with Pinnacle's privacy policy. Please refer to www.pinnacle.edu.au.

Employment

Of the following categories, which BEST describes your current employment status?

- | | | |
|---|--|--|
| <input type="checkbox"/> Full-time employment | <input type="checkbox"/> Employment – unpaid work in a family business | <input type="checkbox"/> Part-time employment |
| <input type="checkbox"/> Self-employed – not employing others | <input type="checkbox"/> Unemployed – seeking full-time work | <input type="checkbox"/> Unemployed – seeking part-time work |
| <input type="checkbox"/> Employer | <input type="checkbox"/> Not employed – not seeking employment | |

Schooling and Higher Education

What is your highest completed school level?

- | | | |
|--|--|--|
| <input type="checkbox"/> Completed Year 12 or equivalent | <input type="checkbox"/> Completed Year 11 or equivalent | <input type="checkbox"/> Completed Year 10 or equivalent |
| <input type="checkbox"/> Completed Year 9 or equivalent | <input type="checkbox"/> Completed Year 8 or equivalent | <input type="checkbox"/> Never attended school |

Have you successfully completed any of the following qualifications? If yes, please select from the following:

- | | | |
|--|---|---|
| <input type="checkbox"/> Bachelor Degree or Higher Degree | <input type="checkbox"/> Advanced Diploma or Associate Degree | <input type="checkbox"/> Diploma or Associate Diploma |
| <input type="checkbox"/> Certificate I | <input type="checkbox"/> Certificate II | <input type="checkbox"/> Certificate III (or Trade Certificate) |
| <input type="checkbox"/> Certificate IV (or Advanced Certificate Technician) | <input type="checkbox"/> Certificates other than the above | <input type="text"/> |

Reason for Study

Of the following categories, which best describes your main reason for undertaking this course? (please tick one only)

- | | | |
|--|--|--|
| <input type="checkbox"/> To get a job | <input type="checkbox"/> It is required for my job | <input type="checkbox"/> I wanted extra skills for my job |
| <input type="checkbox"/> To develop my existing business | <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 |

Other:

Language and Cultural Diversity

- Do you speak a language other than English at home? No Yes, please specify
- How well do you speak English? Not at all Not very well Well Very Well
- Are you of Aboriginal or Torres Strait Islander origin? No Yes, Aboriginal Yes, Torres Strait Islander Both

Disability

Do you consider yourself to have a disability impairment or long-term condition? No Yes

If yes, please indicate the areas of disability, impairment or long term condition: (if more than one applies, please tick)

- | | | | | |
|--|-----------------------------------|--|---|--|
| <input type="checkbox"/> Hearing/Deaf | <input type="checkbox"/> Physical | <input type="checkbox"/> Intellectual | <input type="checkbox"/> Learning | <input type="checkbox"/> Mental Illness |
| <input type="checkbox"/> Acquired Brain Impairment | <input type="checkbox"/> Vision | <input type="checkbox"/> Medical Condition | <input type="checkbox"/> Other | <input type="checkbox"/> Please Specify <input type="text"/> |
| Can Pinnacle provide any assistance? | <input type="checkbox"/> No | <input type="checkbox"/> Yes | <input type="checkbox"/> Please Specify | <input type="text"/> |

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Declaration

I am an accountant or individual who has been working in an accounting practice in a financial support role for a minimum of two years within the last five years and have prior SMSF knowledge.

I declare that I have read, understood and will comply with the requirements of Pinnacle's Student Information Guide, Privacy Policy, Fee Protection and cancellation policy, as per the Pinnacle website at www.pinnacle.edu.au. I understand that some assessment tasks are completed online. I have reliable access to the internet.

The information I have provided may be shared with third parties, but only in accordance with the requirements of Pinnacle's Privacy Policy and the National Training Framework.

I agree that I have read the brochure for this course I am enrolling in and understand what will be awarded upon successful completion of assessment.

I agree that Pinnacle has the right to refuse any application for any reason at its absolute discretion, and also has the right to terminate any enrolment without refund where a student engages in plagiarism or any other form of cheating.

Pinnacle may pass on the details of any such behaviour to training industry regulators, industry bodies associations and AFSL holders.

The information I have provided is true and correct.

Name: _____

Date: ____ / ____ / ____

Payments

Pinnacle complies with Standards for RTOs 2015 # 7.3 Pinnacle has a Fee Protection policy in place to protect fees in excess of \$1500 being pre-paid.

Option 1 - Receipt of Enrolment Pinnacle receives or takes enrolment/application course fee in full.

Option 2 - Payment plan as approved and invoiced. (Please contact your Pinnacle Student Advisor)

Payment Details

A. Bank transfer

Funds have been transferred to or deposited in the following Westpac account of "Pinnacle Financial Services Academy Pty Ltd"

BSB: 032-249 Account: 191072

Transfer date: ____/____/____ (Please include your full name in the reference section)

B. Credit card payment

Mastercard

Visa

Amex*

* 3% processing fee applies to Amex

Card Type:

Names on Card:

Card Number: Expiry Date: /

Signature: Total Amount:

Signature:

By entering my full name above, I acknowledge that this is a legally binding digital signature and authorise Pinnacle Financial Services Academy Pty Ltd to charge my credit card for the amount listed above.

Enrolment and course material delivery terms

Upon enrolment you will be allocated a student advisor who will contact you to introduce themselves. They will discuss your training plan containing your completion due dates, discuss learning and education support available to you throughout the course and clarify assessment requirements.

Course materials are included in the workshop enrolment.

Please contact a student adviser for further information.

Please direct any queries concerning completion of this form to 1300 782 822 or info@pinnacle.edu.au.

Once this form is completed, save and email to enrolments@pinnacle.edu.au so we can finalise your booking.