

APPLICATION TO JOIN THE FPA

Student



FINANCIAL PLANNING
ASSOCIATION of AUSTRALIA

APPLYING FOR MEMBERSHIP IS SIMPLE

Fill in the required information and sign the declaration.

Email it to us at fpa@fpa.com.au, also include a picture of your student identification. You can also mail this form and a copy of your student identification to: FPA, GPO Box 4285 Sydney NSW 2001.

PERSONAL DETAILS (Please use block capitals)		
Title:	DOB:	
First name:	Middle name:	
Surname:	Preferred name:	
Email:	Contact number:	
Mailing address:		
Suburb:	State:	Postcode:

EDUCATION (Please note that FPA Student membership is only open to students studying a full-time business, finance or commerce qualification)

Name of Institution where you are currently studying:

Name of your course:

Anticipated year of completion:

EVIDENCE (Please attach a copy of your student ID and/or relevant document of proof. A picture of your student ID is acceptable)

I have attached a copy of my student identification stating that I am a full-time student; OR

Other relevant documentation stating that I am a full-time student

PRIVACY

The FPA is committed to ensure the personal information of all members are collected, used, handled, stored and disclosed in compliance with the Privacy Act 1988 (Cth) (Privacy Act) and the Australian Privacy Principles (APPs).

The FPA's Privacy Statement (also referred to as Privacy Policy) (available online at www.fpa.com.au/privacy, or upon request) outlines the way in which the FPA will comply with the obligations under the Privacy Act, including an outline on the kind of personal information that will be collected and held, how personal information is collected and held, the purpose of the collection of personal information, how an individual can access personal information and the way in which the FPA will store and disclose personal information.

In the course of FPA activities, the FPA collects and holds personal information. Please be aware that the main purposes for collecting that personal information include those set out in FPA's Privacy Statement. Please ensure that you read this Privacy Statement prior to completing this form.

DECLARATION

 By signing this form, I agree that the following statements are correct:

	I hereby declare that I am a full time student and that the statements made in this application are complete and true at the time of applying for FPA Student Membership. I am not aware of anything which will make ineligible for, or would preclude me from becoming an FPA Student Member.
	I acknowledge and agree that: My affiliation with the FPA is at the FPA's discretion and my affiliation may be revoked at any time without notice. I have read and consent to the terms of the FPA's Statement of Privacy available at www.fpa.com.au/privacy . I consent to the FPA disclosing the fact that I hold affiliation to the FPA to any person (whether upon request or by publication) notwithstanding that such information may comprise personal information or sensitive information within the meaning of those terms under the Privacy Act 1988 (Cth) as amended.

Continued overleaf >

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I remain a fit and proper person to hold FPA affiliation in that:

- a. I have never been refused membership or expelled from membership of a statutory, professional or other body in any professional capacity;
- b. I have never been the subject of disciplinary proceedings within any other professional body or FPA;
- c. I have never been the subject of a hearing to determine whether a disciplinary order to ban me from practising should be made under the Corporations Act or pursuant to any other State or Commonwealth legislation;
- d. I have not been the subject of a successful claim in relation to professional indemnity insurance;
- e. I have never been refused professional indemnity insurance cover;
- f. I have never been dismissed by my Australian Financial Services Licensee because of misconduct or breach of the law;
- g. My ability to act as an authorised representative of an Australian Financial Services Licensee has never been withdrawn, or restricted because of misconduct or breach of the law;
- h. I have never had a business-related license, registration or membership revoked, varied, restricted, denied or suspended;
- i. I have never been in receipt of a Notice from ASIC pursuant to sections 19, 30 or 33 of the Australian Securities and Investments Commission Act and the notice relates to an investigation into the Member's conduct;
- j. I have never given a written undertaking to the Australian Securities and Investments Commission pursuant to section 93AA of the Australian Securities and Investments Commission Act;
- k. I have never breached an undertaking referred to in the preceding paragraph;
- l. I have never become an Insolvent under Administration;
- m. I have never been the director of a body corporate, that became an Externally Administered Body Corporate;
- n. I have not been found guilty of any breach of the law punishable by imprisonment;
- o. I have not become a defendant or respondent in any criminal, civil or regulatory proceeding or investigation;
- p. I have not been dismissed as a Representative or had my authorisation as an Authorised Representative revoked by an Australian Financial Services licensee for any act or omission in breach of the FPA Code, or which could amount to a breach of the FPA Code;
- q. I have disclosed to the FPA all Notifiable Events that have occurred during my membership to date;
- r. I will disclose to the FPA any future Notifiable Events within 7 days of its occurrence.

Hard or electronic copies of the Affiliate Renewal Terms and Conditions can be obtained directly from FPA by contacting the Member Services team on 1300 337 301 or by email to fpa@fpa.com.au.

Your signature:

Date:

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Helpful information for potential student members

Eligibility for student membership

Life-long learning is a hallmark of professionals such as financial planners. This means that they continue to be students at different times throughout their careers, constantly striving to deliver for their clients and improve as professionals.

Student membership is therefore not available to all “students” in the broadest sense of the word. Consistent with Centrelink eligibility (Youth Allowance), with student visa rules, and for discounts such as for transport, movie ticket discounts and banking fees, the FPA provides a special provision for full-time students.

So what is “Full-time”?

Full-time tertiary study is defined as at least ¾ (75%) of the standard full-time load in an approved course of education or study at an Australian institution. For a university degree requiring 24 units over 3 years, this would be 6 units in a single year.

Evidence of full-time student status

Any of:

- Current student card that shows full-time (available at some universities)
- Current international student card (refer to <http://www.isicard.com.au/isic-card.html> – see opposite)
- Enrolment verification statement from the university registrar (i.e. a letter from the university that shows you are currently a full-time student)
- Offer of a place in a course and confirmation of enrolment (that shows full-time status).

Also accepted:

- Current travel discount card that requires proof of full-time status (e.g. NSW Tertiary Concession Card issued by Transport NSW, Tertiary SmartRider from Transperth)
- Evidence of being a Centrelink recipient of Youth Allowance, Current student visa.

Obtaining documentation from your institution

Each university has different processes for documenting enrolment.

- Some will show your full-time/ part-time status on the student card
- Some will show your EFTS (Equivalent Full-Time status) on your enrolment confirmation
- Others have a process to apply for a letter. For example, UNSW has a process to apply for an “Enrolment Statement”. USC has a process to apply for an “Official Letter”. Talk to your Student Administration area or search your university website under student administration, or search words such as “documentation”, “enrolment”, “student ID” etc. to find out the process that applies for you.

Applying for an International Student Card

You may find it worthwhile to apply for an International Student card so that you can benefit from a wide range of student discounts. The following information is from the ISIC website at <http://www.isiccard.com.au/isic-card.html>.

What documents do I need to get an ISIC and Student Edge card?

The ISIC/Student Edge card is only for full-time students, so you need to bring one of the following documents and a recent passport size photograph to your closest STA Travel or ISIC Issuing Branch, or have one ready for upload when you apply online.

- A document that proves you are currently studying full-time at a recognised school, college or university
- A copy of your university of student card, which is dated and clearly indicates you are currently a full-time student
- A signed and dated letter on official university or school stationery, which states you are a full-time student. We would prefer an original copy, but photocopies and faxes may be acceptable and an official proof of your date of birth (i.e. passport, drivers license or birth certificate).

If you have any queries or require any further information, please contact the FPA Member Services team on 1300 337 301 or email fpa@fpa.com.au.