



NEILSON FOUNDATION FINANCIAL PLANNING SCHOLARSHIP
2015 TERMS AND CONDITIONS

WHAT THIS SCHOLARSHIP PROVIDES

The Neilson Foundation Financial Planning Scholarship for 2015 will provide the following support for up to one year (based on a full-time enrolment of at least 100 credits per semester):

- 1) A total value of up to \$15,000 paid as a cash stipend of \$7,500 per semester. The stipend can be used at your discretion to contribute towards educational related expenses.
- 2) Opportunity to apply for one month's paid summer work experience in Platinum Investment Limited's Sydney Office.

If you receive a Centrelink payment, you should declare to Centrelink any scholarships you are awarded.

The Australian Tax Office has a "[Is your scholarship taxable?](#)" tool on their website to help you determine if your scholarship is taxable. For expert advice please contact the Australian Taxation Office (www.ato.gov.au) or your accountant.

CONDITIONS THAT NEED TO BE MET TO KEEP YOUR SCHOLARSHIP

- 1) Deferral of this scholarship is not permitted.
- 2) Unless there are **exceptional circumstances** you must:
 - Remain enrolled in the Bachelor of Commerce (Financial Planning) or (Financial Planning and Accounting).
 - Maintain a full-time enrolment of at least 100 credits per semester at Curtin University. If any study is undertaken below 100 credits per semester, you are required to seek approval for this change from the Scholarships Office who will assess your request in consultation with a representative of Platinum Investment Limited.
 - Remain eligible for a Commonwealth Supported place at Curtin University (this means you must be an Australian citizen, Australian permanent resident, Australian permanent humanitarian or a New Zealand citizen) and be residing in Australia.
 - Maintain a course weighted average (CWA) of at least 70 and pass all units attempted per semester. Academic monitoring of scholarship recipients will occur each semester.
- 3) Leave of absence is not permitted
- 4) You are ineligible to apply for or receive any other industry funded scholarships whilst in receipt of the Neilson Foundation Financial Planning Scholarship.
- 5) If you cease studies at Curtin, either voluntarily (e.g. by withdrawing from course or units) or involuntarily (e.g. termination from course due to unsatisfactory course progress or suspension, termination or expulsion due to misconduct), you will become ineligible for continuation of this scholarship. The scholarship will cease immediately and you will be required to repay any stipend awarded for the most recent study period.
- 6) The Neilson Foundation Financial Planning Scholarship has been awarded for a particular course and major at Curtin University and is not transferable into any other course, major or university.

Unless there are **exceptional circumstances**, if you have unsatisfactory progress or breach the scholarship conditions, you shall be ineligible to retain the scholarship.

Exceptional circumstances must be forwarded in writing to the Scholarships Office, along with supporting documentation (e.g. medical, counselling). Requests will then be assessed by the Scholarships Office in consultation with a representative of Platinum Investment Limited and you will be notified of the outcome once a decision has been reached.

PAYMENTS

The Neilson Foundation Financial Planning Scholarship will commence from semester 1, 2015.

Cash payments of \$7,500 will be paid to your nominated bank account each semester.

Cash payments are based on full-time enrolment of 100 credits per semester.

First scholarship payment will be made approximately end July. The second and final payment will be made post census date (mid-end September).

Note: Your scholarship payment will appear on your bank statement with the reference as follows: DEPOSIT CONCUR TECHNOLOG CP#####.



**Please read, sign and return (pages 1 & 2) of the
Neilson Foundation Financial Planning Scholarship
2015 Terms and Conditions**

Scholarships Office
Building 101, Level 1
Curtin University
GPO Box U1987
PERTH WA 6845

SCHOLARSHIP ACCEPTANCE AND CONSENT

- I have read, understood and accept the attached terms and conditions governing the Neilson Foundation Financial Planning Scholarship and I agree to abide by these conditions and obligations outlined therein.
- I accept your offer of the Neilson Foundation Financial Planning Scholarship under the conditions specified.
- I understand that if I fail to meet my obligations as outlined in the terms and conditions or change any of the below course or major information without prior approval from the Scholarships Office, I risk my scholarship being terminated. Should this occur, I understand I will not be eligible to receive any further semester cash payments or the opportunity to apply for the one month's paid work experience for the remainder of my studies with Curtin University.
- I understand and agree that details relating to my enrolment, academic record and contact information will be made available to Platinum Investment Limited for the purposes of on-going scholarship administration.
- I confirm that I do not currently hold any other industry sponsored scholarships that Platinum Investment Limited and Curtin University are not aware of and I understand I must not apply for or receive any other industry sponsored scholarships whilst receiving the Neilson Foundation Financial Planning Scholarship.
- I consent to the collection, use, storage and disclosure of my personal information by Curtin University in connection with the scholarship, including (without limitation) for the administration of the Neilson Foundation Financial Planning Scholarship, Curtin University's general administrative purposes which includes communications involving surveys, the availability of courses, alumni activity, newsletters and promoting the scholarships program through any medium whatsoever (including, without limitation, through advertisements, posters, books, articles, social media websites and on the world wide web generally) for public relations, promotional, commercial and advertising purposes.

I am currently enrolled in the following course (please tick):

- Bachelor of Commerce (Financial Planning)
- Bachelor of Commerce (Financial Planning and Accounting)

Curtin Student Number: _____

Student Full Name: _____

Student Signature: _____ Date: _____