

What is the Neilson Foundation (in association with Platinum Asset Management) Financial Planning Scholarship?

The Neilson Foundation (in association with Platinum Asset Management) wish to foster mutually beneficial links with La Trobe University through the provision of a scholarship to a high achieving second and third year undergraduate student who is enrolled in the Bachelor of Finance degree, or any business-related degree program, with a major/ specialisation in financial planning. The Neilson Foundation (in association with Platinum Asset Management) is a philanthropic Foundation established to promote and support the Platinum Asset Management values.

How much is the scholarship?

\$12,500.

Who is eligible to apply?

To be eligible to apply, you must:

- be an Australian Citizen or Permanent Resident
- be currently enrolled in the first semester of your second year of your undergraduate degree in any business-related degree program (such as Finance, Accounting, Business, International Business) **and** be completing a major in Financial Planning **OR**
- be in the third/final year of your undergraduate degree in any business-related degree program (such as Finance, Accounting, Business, International Business), **and** be specialising/undertaking a major in financial planning; and
- be studying full time; and
- not be in receipt of any other scholarship (other than government scholarship/grants and/or entitlements); and
- have achieved a minimum Weighted Average Mark (WAM) of 65 to date; and
- maintain enrolment in financial planning major or specialisation for the duration of the scholarship

How are the applications assessed?

The recipient of the Scholarship shall be selected by the University based on:

- An application form including academic results for the following period:
  - Up to and including first semester of second year results.
- The completion of a 250-word essay describing “Career goals and ambitions and how the awarding of The Neilson Foundation (in association with Platinum Asset Management) Scholarship would facilitate a career in financial planning.”
- An interview with the selection committee (if required).

Helpful information

- **Alternative format:** this application form is available in an alternative format for those who need it, upon request, please email: [scholarships@latrobe.edu.au](mailto:scholarships@latrobe.edu.au)
- **Detailed information:** Make sure you provide full details requested in Sections 1, 2 and 3 of this application. Otherwise, your application may not be assessed appropriately. All information will be treated with strict confidentiality.
- **Supporting documentation:** Supporting documentation is written verification from someone who is qualified to comment on our circumstances. The person must not be related to you or in a close personal relationship with you.
- **False or misleading information:** La Trobe University reserves the right to withdraw an offer of a bursary and re-assess the application if the University believes the recipient has provided false or misleading information in the application form or subsequently.
- **Late applications:** applications received after the closing date may be accepted by staff **only if accompanied by a signed formal request** outlining **exceptional circumstances outside your control** that have resulted in a late application, e.g. serious illness or other personal crisis. The selection committee will later determine whether a late application will be considered, based on the explanation you provide. (*Note: Reasons relating to employment, placements, holidays or other activities that you choose to engage in are unlikely to be considered “exceptional”.*)
- **Application process:** the assessment will commence after the application closing date. You will be notified of the outcome via email approximately 2 weeks after the application closing date. To ensure that all candidates are treated with equity, staff are unable to advise you of the progress of an individual application.

Where to submit the completed application form

You may submit your completed application form via email only.

Email: [scholarships@latrobe.edu.au](mailto:scholarships@latrobe.edu.au).

**Please note, there are two different closing dates:**

- Applications for the Third/Final Year Scholarship close on Friday 27 April 2018.
- Applications for the Second Year Scholarship close on 1 June 2018

**Confidentiality**

All information provided by applicants will be treated as confidential. At La Trobe University, we respect the privacy of your personal information. We collect personal information in your application to determine your eligibility for a scholarship, bursary or grant, and to assess your application as part of the ranking and allocation process. In accordance with privacy laws, personal information about you contained in your application will not be used for any other purpose or disclosed to any person who is not part of the La Trobe assessment and allocation process, without your permission. You may have the right to access personal information we hold about you, subject to any exceptions in relevant laws, by contacting the Scholarships Unit as noted below. The La Trobe University privacy policy can be viewed at [www.latrobe.edu.au/privacy/](http://www.latrobe.edu.au/privacy/)

**Section 1: personal and course details**

Student number:

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Family name

Given names

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Enrolled course

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Major (must be financial planning)

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Please list all the financial planning subjects you have undertaken or are currently enrolled in:

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Please indicate which scholarship you are applying for:

<input type="checkbox"/>	The Neilson Foundation (in association with Platinum Asset Management) <b>Second Year</b> Financial Planning Scholarship
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<input type="checkbox"/>	The Neilson Foundation (in association with Platinum Asset Management) <b>Third/Final</b> Year Financial Planning Scholarship
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**IMPORTANT INFORMATION**

- Applications for the Third/Final Year Scholarship close on Friday 27 April 2018.
- Applications for the Second Year Scholarship close on 1 June 2018

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**Section 2: personal statement and supporting documents**

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1. Please provide as a separate attachment, your personal statement describing your “Career Goals and Ambitions and how the awarding of The Neilson Foundation (in association with Platinum Asset Management) Scholarship would facilitate a career in financial planning.”

Your statement must be typed and include your name, signature and the date.

2. Please also attach the following:
- A copy of your CV/Resume
  - Two referee statements
  - Any other supporting documents that you feel are relevant to your application.

Note: Applications will be assessed using the information provided by you in this application and your academic transcript, which the University will produce and attach to your application after it is received.

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**Section 3: declaration**

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I (your full name)

Being the applicant for a Platinum Asset Management Financial Planning Scholarship, do solemnly and sincerely declare that the statements made in this application and in the accompanying documents are true in every particular, to the best of my knowledge and belief.

I understand that if I provide inaccurate information in this application this may result in cancellation of an offer of a scholarship or termination of a scholarship that has been paid and refund to the University of any monies received by me.

I also understand that the scholarship assessment and allocation process is competitive and that not all applicants who meet the eligibility criteria will be awarded a scholarship.

Further, I understand that giving false and misleading information is a serious offence under the criminal code (Commonwealth).

I understand that should I be awarded a scholarship I will be required to:

- supply a thank you note to the Donor
- maintain satisfactory academic progress
- maintain full-time enrolment in a Business-related undergraduate degree

I understand that should I be awarded a scholarship I may be required to:

- attend joint promotional events or participate in promotional activities in keeping with the spirit of the scholarship as reasonably required by the donor and La Trobe University

I have read and understood the information on page one of this form, including the declaration and agree to these conditions.

Student signature

Date

<input type="text"/>	<input type="text"/>
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**Section 4: checklist**

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		Circle YES or N/A where appropriate	
I have read and understood the eligibility criteria of the Platinum Asset Management Scholarship.		YES	
I have completed all relevant sections of the application form and included copies of all the required documentation.		YES	
I have completed, signed and attached my personal statement (Section 2.1).		YES	
I have attached supporting documents as outlined in Section 2.2.		YES	
Any other supporting documents attached? Please list them here:		YES	N/A
• _____			
• _____			
• _____			
Name of applicant:			
Signed:		Date:	