

# Enrolment Contract

Please note two original copies of page 2 of this document are required.



Please enrol: \_\_\_\_\_  
(forenames) (surname)

Who is my: \_\_\_\_\_  
(son/daughter/friend/other)

With The Personal Advocacy Trust Incorporated.

## Details of the person to be enrolled

Date of Birth: \_\_\_\_\_  
Disability diagnosis: \_\_\_\_\_  
Source of diagnosis: \_\_\_\_\_  
Current Address: \_\_\_\_\_  
Email address: \_\_\_\_\_  
Home phone number: \_\_\_\_\_ Cell phone number: \_\_\_\_\_

NB. More detailed information will be taken by an Advocate at an initial visit.

## Family Details

Father's name: \_\_\_\_\_ Year of Birth: \_\_\_\_\_  
Address: \_\_\_\_\_  
Mother's name: \_\_\_\_\_ Year of Birth: \_\_\_\_\_  
Address (if different): \_\_\_\_\_  
Names of siblings: \_\_\_\_\_  
\_\_\_\_\_

## Details of person completing the application (if not parents)

Name: \_\_\_\_\_ Year of Birth: \_\_\_\_\_  
Relationship to prospective member: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_

## Provision for Annual Subscription for Pre Support

(please refer to accompanying Schedule One: Enrolment Contract)

I/we understand that a Pre Support Subscription cost of \$126 will be payable annually.

## Provision for Enrolment Fee for Full Support

(please refer to accompanying Schedule One: Enrolment Contract)

I/we have arranged to pay an enrolment fee of \$ \_\_\_\_\_ in one of the following ways:

a) By lump sum payment of: \$ \_\_\_\_\_

<p>b) By instalments* of: \$ _____ at a frequency of: _____  for a duration of: _____</p> <p>c) By Testamentary Will** of: _____</p> <p>* I understand that when paying in instalments, my will must provide to pay the balance of the fee (if any) at the time of my death. I undertake to instruct my solicitor to notify the Trust confirming that provision for the enrolment fee has been made in my will, and I undertake to advise the Trust should I delete the provision or make any alteration to it.</p> <p>**I understand that when making provision in a will, the amount payable will be the enrolment fee which is current at the time of my death, and that the enrolment fee will increase every three years to adjust for CPI inflation. I undertake to instruct my solicitor to notify the Trust confirming that provision for the enrolment fee has been made in my will, and I undertake to advise the Trust should I delete the provision or make any alteration to it.</p>
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I \_\_\_\_\_ agree to pay Pre Support Subscription costs of \$126 annually as payment for pre support, as outlined in the accompanying schedule. I additionally agree to pay a total Full Support Enrolment fee of \$ \_\_\_\_\_ as payment for full support, as outlined in the accompanying schedule.

Name: \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

The Personal Advocacy Trust agrees to deliver pre support on receipt of annual payment, as outlined in the accompanying schedule.

The Personal Advocacy Trust agrees to deliver full support on (the later of) receipt of the enrolment fee payment or death of the parents, as outlined in the accompanying schedule.

Name: \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

# Schedule One: Enrolment Contract

The Personal Advocacy Trust, hereafter referred to as “The Trust,” is a not-for-profit registered Charitable Trust, providing advocacy for people with Intellectual Disabilities after their parents die. Members of the Trust are provided advocacy, funded entirely through the payment of a Pre Support Annual Subscription, and a Full Support Enrolment fee.

## **Pre Support Annual Subscription**

A member is classified as Pre Support while their parents are living, and it is assumed that during their lifetime (while able) the parent/s will be their son or daughter’s primary Advocate. The Trust commits to a minimum of biannual contact with all Pre Support members and families. This contact includes keeping vital records up to date and current, and importantly establishing and maintaining a relationship with the member. Pre Support is funded through the payment of a subscription of \$126 per annum. This subscription is payable in advance annually, or by lump sum in advance for longer periods of time. The Pre Support subscription amount will be adjusted every three years to compensate for CPI inflation. Pre Support Subscription costs will be invoiced annually (unless paid in advance for a longer period of time), and Pre Support subscription fees are non-refundable.

## **Full Support Enrolment Fee**

A member transitions to Full Support after the death of their last surviving parent, or at an earlier date with the agreement of the Trust Board. The Trust commits to delivering a minimum of quarterly advocacy support visits, and up to 12 hours of advocacy annually, depending on needs and the plans made with the person and their supporters. The Advocates role is to work with the member and all those involved - other agencies and individuals - who are in contact to facilitate the member enjoying a high standard of health and wellbeing.

Extra support/advocacy can be provided as necessary in times of crisis.

The Full Support Enrolment Fee is carefully calculated on the basis of advice by professional actuaries, so as to be sufficient to fund full advocacy support for a member for the duration of their life. It takes into consideration the age of the member when enrolling, current life expectancy predictions, and the potential growth of the funds paid through investment. The Full Support Enrolment Fee may be refundable\*. There are several options for the method of payment of the Full Support Enrolment Fee\*\*:

- a) By lump sum payment prior to or upon commencement of Full Support services.
- b) By annual instalments for a term of 5 or 10 years (*other terms may apply and terms are set on a case by case basis*).
- c) By monthly payments for a term of 5 or 10 years (*other terms may apply and terms are set on a case by case basis*).
- d) Deferred Payment by Testamentary Will – When this option is selected the Enrolment Fee payable will be the current fee applicable at the time of death. It is the Trust’s policy to increase fees every three years to allow for CPI adjustment. An invoice will be issued annually on the anniversary of enrolment advising of the current fee rate. Where there is insufficient funds or failure to provide for the enrolment fee within the Will, membership will be cancelled.

*\*If a member is withdrawn from the Trust while still on Pre Support the membership fee will be up to 100% refundable, exclusive of interest. If a member is withdrawn when on Full Support, the membership fee will be non-refundable.*

*\*\*In all cases Full Support Enrolment may only occur with the agreement of the Trust Board on terms, including terms of payment, acceptable to the Trust Board.*

<b>Full Support Enrolment Fee 2017 – all fees are inclusive of GST</b>			
Under 45		Over 45	
Lump Sum Payment	\$14,500	Lump Sum Payment	\$18,130
Annual Payment (10 year term)	\$1,450	Annual Payment (10 year term)	\$1,813
Annual Payment (5 year term)	\$2,900	Annual Payment (5 year term)	\$3,626
Monthly Payment (10 year term)	\$121	Monthly Payment (10 year term)	\$151
Monthly Payment (5 year term)	\$242	Monthly Payment (5 year term)	\$303
Immediate Full Support at any age		\$18,130	

### **Other Provisions**

The Trust can also administer Discretionary Trusts for its members. Funds are invested, and easily accessible to the member by application to the Board. The Personal Advocacy Trust charges a nominal 1% annually for this service, with nil application, disbursement, or administrative fees. Discretionary Trusts may be established for members at the time of enrolment, or anytime thereafter.