

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 and Safeguarding Adults 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: _____
Is there an Enduring Power of Attorney appointed?	_____
If so, who?	_____
Is there a Welfare Guardian appointed?	_____
If so, who?	_____
Is there a Property Manager or Administrator appointed?	_____
If so, who?	_____
NB. More detailed information will be taken by an Advocate at an initial visit.	

Family Details	
Father's name:	_____ Year of Birth: _____
Address:	_____ _____
Email:	_____
Phone:	_____
Mother's name:	_____
Address (if different):	_____ _____
Email:	_____
Phone:	_____
Names of siblings:	_____ _____

Details of person completing the application (if not parents)

Name: _____	Year of Birth: _____
Relationship to prospective member: _____	
Address: _____	

Email: _____	
Phone: _____	

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 \$140 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: \$ _____

b) By instalments* of: \$ _____ at a frequency of: _____
for a duration of: _____

c) By Testamentary Will** of:

d) Through annual payments from the establishment of a Discretionary Trust***

* 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.

**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.

*** I understand that when paying annually through a Discretionary Trust, that the value of the establishing funds of the Discretionary Trust must be at a minimum, equal in value to the Full Support Fee at the time Full Support commences.

I _____ agree to pay Pre-Support Subscription costs of \$140 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

Name: _____

Signed: _____ Date: _____

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

The Personal Advocacy and Safeguarding Adults 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

1. The Personal Advocacy and Safeguarding Adults 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.
2. Members of the Trust are provided advocacy, funded entirely through the payment of a Pre-Support Annual Subscription, and a Full Support Enrolment fee.
- 3. Pre-Support Annual Subscription**
 - 3.1. 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.
 - 3.2. 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.
 - 3.3. Pre-Support is funded through the payment of a subscription of \$140 per annum. This subscription is payable in advance annually, or by lump sum in advance for longer periods of time.
 - 3.4. The Pre-Support subscription amount will be adjusted every three years to compensate for CPI inflation.
 - 3.5. 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.
- 4. Full Support Enrolment Fee**
 - 4.1. 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.
 - 4.2. The Trust commits to delivering a minimum of three advocacy support visits per annum, and up to 12 hours of advocacy annually, depending on needs and the plans made with the person and their supporters.
 - 4.3. The Advocate’s 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.
 - 4.4. Extra support/advocacy can be provided as necessary in times of crisis.
 - 4.5. 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.
 - 4.6. The Full Support Enrolment Fee may be refundable¹.

¹ 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.

4.7. There are several options for the method of payment of the Full Support Enrolment Fee²:

4.7.1. By lump sum payment prior to or upon commencement of Full Support services.

4.7.2. 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*).

4.7.3. 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*).

4.7.4. 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.

4.7.5. Through the establishment of a Discretionary Trust for their family member. PASAT would be appointed as the Trustees of a Discretionary Trust in the name of the prospective member of the Trust. This could be established at any time, including through a Testamentary Will after the death of parents. PASAT will administer the Discretionary Trust to provide for the health, wellbeing and comfort of the enrolled member, as dictated by the Trust's Deed or Letter of Wishes. PASAT will withdraw advocacy support fees on an annual basis from the member's Discretionary Trust. This will be in accordance to the support level agreed to by the family at the time the Discretionary Trust is established. Through their Discretionary Trusts, families will therefore only pay PASAT for advocacy support actually delivered annually, not a lifetime fee.

5. Provision of Immediate Full Support and Enrolment of Young Persons

5.1. The Trust may at its discretion provide Full Support advocacy to a person enrolling in the Trust, without requiring a period of Pre-Support. This is called Immediate Full Support.

5.2. The Trust may accept enrolment of young persons (aged 18 – 30 years old) requiring Immediate Full Support upon receipt of the completed Enrolment Contract and the Full Support Enrolment Fee, with initial support being guaranteed up to the age of 40 years old.

5.3. The Trust may approve progression to lifetime membership thereafter on a case-by-case basis.

5.4. In situations where lifetime membership following Immediate Full Support is declined, a pro-rata refund of the (remaining) Full Support enrolment fee is made.

² 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.

6. Full Support Fee Schedule

Full Support Enrolment Fee 2022 – all fees are inclusive of GST			
Under 45 (requires Pre -Support)		Over 45	
Lump Sum Payment	\$15,850	Lump Sum Payment	\$19,800
Annual Payment (10 year term)	\$1,585	Annual Payment (10 year term)	\$1,910
Annual Payment (5 year term)	\$3,170	Annual Payment (5 year term)	\$3,960
Monthly Payment (10 year term)	\$132	Monthly Payment (10 year term)	\$165
Monthly Payment (5 year term)	\$264	Monthly Payment (5 year term)	\$330
Immediate Full Support commencing between 30 – 45 years old			\$30,500
Immediate Full Support commencing between 18 – 30 years old			\$38,200

7. Other Provisions

- 7.1. 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 and Safeguarding Adults Trust charges a nominal 1% annually for this service, with nil application, disbursement, or administrative fees.

- 7.2. Discretionary Trusts may be established for members at the time of enrolment, or anytime thereafter.