



# Training agreement

## Strategi Institute Limited

### A. Employer information (Complete all fields)

Company name			
Trading as (if applicable)			
Street address	Suburb	City/town	
Main contact name	Main contact ph DDI		
Main contact mobile	Email		

### A1. Employer accounts payable information

Contact name			
Contact mobile			
Email			
Email address where invoices and statements are to be sent <small>(if different to above)</small>			

### B. Trainee information (Complete all fields)

State your full legal name as it appears on your birth certificate or passport.

First name			
Preferred name	Middle name		
Surname			

If you have changed your name by marriage, civil union, deed poll, or statutory declaration, you may be registered with the New Zealand Qualifications Authority under your previous name. Please state your previous name(s) and attach verified documents.

Previous full legal name(s)			
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Date of birth	NZQA or National Student Number (NSN) <small>(if known)</small>		
Gender			
Street address			
Suburb	City/Town	Postcode	
Work phone	Home phone		
Mobile	Email		

Please tick if you are:

Employee

Self-Employed

Volunteer

Have you done any industry training with another Private Training Establishment (PTE):

Yes

No

**B1. Ethnicity (Tick the ethnic groups that you belong to for statistical purposes)**

NZ European/Pakeha	NZ Maori *	Italian	Samoan	Other European
African	Dutch	Japanese	South Slav	Other Pacific Nation
Australian	Fijian	Korean	Sri Lankan	Other Southeast Asian
British/Irish	Filipino	Latin American	Tokelauan	Other
Cambodian	German	Middle Eastern	Tongan	
Chinese	Greek	Niuean	Vietnamese	
Cook Island Maori	Indian	Polish	Other Asian	

\*Iwi: If you selected NZ Maori above, please state the name(s) of all your iwi:

I don't know

I don't identify with an iwi

**B2. Education**

Last secondary school attended in New Zealand

Last year at secondary school

OR – if you did not attend secondary school in NZ then please state the overseas country where you went

If English is not your main language what is?

**i) Highest secondary school qualification achieved (tick one)**

No formal secondary school qualification	NCEA Level 2 or 6th Form Certificate	Overseas qualification (includes International Baccalaureate & Cambridge Exams)
14 or more credits at any level	NCEA Level 3 or Bursary or Scholarship	Other
NCEA Level 1 or School Certificate	University Entrance	

**ii) Highest tertiary qualification achieved (tick one)**

No Qualification	Bachelor Degree	Postgraduate Diploma/Certificate, Bachelor Honours
Certificate. If yes, which level?	Masters Degree	Doctorate Degree
Diploma. If yes, which level?		

**B3. Previous employment or activity**

Please select your occupation or activity before you started with this employer

Secondary school student	Private training student	Wage or salary worker	Self-employed
Polytechnic student	Wananga student	House-person or retired	Non-employed or beneficiary
College of Education student	University student	Overseas	

**B4. Learner needs**

Do you have a difficulty that may affect your ability to learn?

Yes

No

If yes, please specify \*

\* If you would like to discuss your learning needs in confidence, please email [meenu.gulati@strategi.ac.nz](mailto:meenu.gulati@strategi.ac.nz) as extra learning support may be available.

**B5. Evidence documents**

We need to ensure that you meet the entry criteria to enrol. Please provide the relevant evidence documents as set out in the [enrolment checklist](#).

## C. Qualification/programme schedule

Preferred start date

### C1. Qualification/programme

Select a qualification/programme by ticking the appropriate box

Financial services				
Selection		Study method	Duration	Price (excl. GST)
New Zealand Certificate in Financial Services (Level 5) V2				
General Insurance strand	<input type="checkbox"/>	Online	8 months	\$850
	<input type="checkbox"/>	Virtual classroom	8 months	\$1,200
	<input type="checkbox"/>	Face-to-face classroom	8 months	\$1,700
Investment strand	<input type="checkbox"/>	Online	8 months	\$850
	<input type="checkbox"/>	Virtual classroom	8 months	\$1,200
	<input type="checkbox"/>	Face-to-face classroom	8 months	\$1,700
Life, Disability, and Health Insurance strand	<input type="checkbox"/>	Online	8 months	\$850
	<input type="checkbox"/>	Virtual classroom	8 months	\$1,200
	<input type="checkbox"/>	Face-to-face classroom	8 months	\$1,700
Residential Property Lending strand	<input type="checkbox"/>	Online	8 months	\$850
	<input type="checkbox"/>	Virtual classroom	8 months	\$1,200
	<input type="checkbox"/>	Face-to-face classroom	8 months	\$1,800

### C2. Payment details

Select whether the programme is paid for by the trainee or employer:

Trainee

Employer (Complete the following if the employer is making payment)

Name of person/company making payment

Billing address (if not previously given)

Email (for invoice/receipt)

An invoice will be provided upon receipt of all your documents. Please click the link on your invoice to pay via credit card or internet banking. Upon receipt of payment, your application will be processed.

### C3. Checklist

Please include:

- Training agreement (signed by you and your employer)
- Evidence documents (please refer to Section B5)
- Full payment details

### D. Declaration (Complete all fields)

#### Signed for and on behalf of the employer

By signing this training agreement, I confirm that I have read, understood, and agreed to the terms and conditions of this training agreement. I confirm the trainee has a current employment agreement (this can include a self-employment contract of service) or volunteer/unpaid agreement. I confirm that I have the right to sign this training agreement on behalf of the employer.

<b>Main contact name</b>			
<b>Main contact signature</b>		<b>Date</b>	

Strategi Institute may send you promotional materials to keep you informed about resources and other available programmes. If you do not wish to receive any promotional material please tick this box

#### Signed by the trainee

By signing this training agreement, I confirm that I have read, understood, and agreed to the terms and conditions of this training agreement. I also confirm that the information supplied is true and correct and that I have the legal right to work in New Zealand during the length of my employment agreement (this can include a self-employment contract of service) or volunteer/unpaid agreement.

<b>Trainee signature</b>		<b>Date</b>	
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Strategi Institute may send you promotional materials to keep you informed about resources and other available programmes or related goods and services. If you do not wish to receive any promotional material please tick this box

## Training agreement general terms and conditions

### 1. Object

- 1.1. The training agreement ('TA') is a contract between Strategi Institute, the trainee, and the employer. It forms part of the employment agreement or volunteer employment agreement between the trainee and the employer.
- 1.2. The TA allows the trainee to participate in a structured training qualification programme (programme). The programme allows the trainee to achieve unit standards leading to a prescribed New Zealand Qualifications Authority ('NZQA') qualification or programme.

### 2. Term

- 2.1. The TA starts on the date the TA is registered by Strategi Institute or when the programme starts, whichever is the earlier, but will not be effective until the TA is registered by Strategi Institute. The TA will end on the date the trainee completes the qualification unless it is ended earlier in accordance with clause 6 below ('Termination').

### 3. The employers obligations

- 3.1. The employer agrees to:
  - a. Make sure that the trainee meets all the necessary entry requirements to be a trainee under the TA.
  - b. Facilitate, and actively encourage, the Trainee's participation in all learning needs assessment and training required for the programme. This includes releasing the trainee to attend off-job training courses, and providing learning support to meet identified learning needs (if required), and meeting health and safety requirements.
  - c. Provide training and the opportunity to gain experience in all aspects of the trainee's internship, if applicable.
  - d. Make sure that any on-job assessment is carried out by a Strategi Institute approved assessor.
  - e. Make sure that during training a trainee is supervised by a person that meets industry licensing requirements.
  - f. Pay the required fees to Strategi Institute by the due date, fees are detailed in Section C.
  - g. Pay Strategi Institute back for all costs, expenses and/or losses, (including, but not limited to, legal and collection costs) sustained by Strategi Institute in recovering the payment.
  - h. Ensure that no other government funding or subsidies are received in relation to the programme.
  - i. Read and understand Strategi Institute's appeals process, reassessment charges, withdrawals and refunds policy as set out in the [candidate guidelines](#).
  - j. Have and implemented, a fit-for-purpose health and safety management system which includes:
    - i. Having current policies and processes.
    - ii. Making trainee's aware of their employers' health and safety policies and processes and the trainees' responsibilities under those health and safety policies and processes.
    - iii. Making sure the trainee can follow reasonable instructions from a training provider and/or assessor.
    - iv. Notify Strategi Institute immediately where:
      1. The trainee enrolls with any other PTE at any time during the course or the programme, or
      2. The trainee's immigration status changes, or
      3. The trainee's employment or volunteer work agreement ceases, or
      4. The employer's business is sold.

### 4. The trainee's obligations

- 4.1. The trainee agrees to:
  - a. Adhere to the Strategi Institute [candidate guidelines](#).
  - b. Achieve the required number of credits each year, as agreed in the programme.
  - c. Pay the fees for the programme, as specified in the enrolment form, to Strategi Institute by the due date.
  - d. Complete the programme within the required time.
  - e. Not apply for, or receive, any government funding or subsidy in relation to the TA.
  - f. Provide all necessary documentation to Strategi Institute confirming their eligibility to undertake the programme.
  - g. Pay Strategi Institute back for all costs, expenses and/or losses (including but not limited to legal and collection costs) sustained by Strategi Institute in recovering any unpaid fees.
  - h. Follow all health and safety policies and instructions.
  - i. Attend any required training.
  - j. Notify Strategi Institute immediately where:
    - i. They enrol with any other industry training provider at any time during the course or the programme, or
    - ii. Their immigration status changes, or
    - iii. Their employment or volunteer/unpaid work agreement ceases.
    - iv. Their contact details change.

## 5. Strategi Institute

### 5.1. Strategi Institute will:

- a. Support the trainee and the employer via their account manager to provide pastoral care.
- b. Monitor trainee progress to ensure completion of all programme milestones.
- c. Process any valid assessment results sent to Strategi Institute and forward results to the trainee and NZQA.
- d. Be available to assist the employer and/or the trainee on matters related to this TA and/or the programme.
- e. As far as reasonably practicable, consult and coordinate training and assessment activities and co-operate with its assessors, employers and trainees, so all can meet their joint health and safety responsibilities under this TA and the Health & Safety at Work Act 2015('Act').
- f. Provide relevant guidance and information to assessors, employers and trainees, on health and safety matters when arranging training and assessment under this TA.
- g. Regularly monitor its contractors' activities to ensure all assessors fulfil their responsibilities under the Act, and in particular:
  - i. Make sure trainees can understand and follow reasonable instructions from a Strategi Institute and/or assessor.
  - ii. Make sure trainees understand any specific safety requirements as set by Strategi Institute and assessor during training and assessment before and during training and assessment.

## 6. Termination

6.1. This TA may be terminated in accordance with the provisions of the employment or volunteer agreement between the trainee and the employer. Termination of the employment or volunteer agreement between the trainee and the employer will automatically result in termination of this TA.

### 6.2. This TA will also terminate if:

- a. The trainee does not achieve credits in accordance with the programme, or
- b. Strategi Institute becomes aware that the employer or the trainee is unable to fulfil their training responsibilities under the programme, or
- c. The trainee or employer fails to pay any required fees, or
- d. Strategi Institute does not receive sufficient funding to support continued training of the trainee.

## 7. Miscellaneous

- 7.1. The personal information Strategi Institute collects from the trainee in this TA, and during the trainee's enrolment in the programme, will be stored, used, and disclosed in the ways set out in our privacy statement. This Privacy policy can be found as part of the candidate guidelines and explains how personal information can be accessed and corrected at any time.
- 7.2. Enrolment in the programme activates trainees' subscription to the Strategi Institute e-newsletter (unless the trainee has ticked the unsubscribe box in Section D). Trainees can also unsubscribe from the Strategi Institute e-newsletter at any time by following the process set out in the e-newsletter or contacting Strategi Institute.
- 7.3. Strategi Institute has a transparent assessment appeals process. If a trainee wishes to appeal an assessment decision, they should contact Strategi Institute at [assessor@strategi.ac.nz](mailto:assessor@strategi.ac.nz), within 14 days of the notification of the assessment decision explaining why they want to appeal the decision.
- 7.4. Only three assessment attempts are permitted per assignment.
- 7.5. The TA may only be varied by agreement in writing between the employer, the trainee, and Strategi Institute.
- 7.6. The Employer and the Trainee agree that they may not assign or sub-contract their obligations under this TA except with the prior written consent of Strategi Institute.
- 7.7. This TA is governed by the laws of New Zealand. The Employer and Trainee agree to submit to the exclusive jurisdiction of the courts of New Zealand.
- 7.8. Any funding support Strategi Institute provides under this TA is dependent on Strategi Institute receiving Tertiary Education Commission funding.
- 7.9. Strategi Institute will not be liable for any loss arising from the actions or inactions of the Trainee which may result in, or cause, any third-party property damage or third-party bodily injury.

## 8. Withdrawals

- 8.1. Applications for withdrawals from a programme must be made in writing to Strategi Institute via email: [support@strategi.ac.nz](mailto:support@strategi.ac.nz). The following rules apply to withdrawals.

Date of withdrawal (received by Strategi Institute)	Refund of fees	Admin fee	Effect on record of learning
Within 8 days of the date Strategi Institute sent the training materials to the Trainee and no classroom has been attended by the Trainee and no work has been received by Strategi Institute.	Enrolment fee less Administration fee	The lesser of 10% or \$500	There will be no record of your enrolment on your record of learning if all training materials are returned to Strategi Institute.
After 8 days of the date Strategi Institute sent the training materials to the Trainee.	No refund	Nil	Your record of learning will state 'Withdrawn'.