

Service Agreement	
Service Provision	<p style="text-align: center;">For provision of Financial Intermediary & Plan Management services</p> <p>Aver Plan Managers is a plan management and financial intermediary service to participants of the NDIS. This Service Agreement is between <i>Aver Plan Managers</i> and the participant/nominated representative in the National Disability Insurance Scheme. This Service Agreement will be in effect from today for the duration of the Participant's association with <i>Aver Plan Managers</i>, or until we are notified otherwise in writing by the Participant/nominated representative. To engage the services of <i>Aver Plan Managers</i>, upon acceptance of this Service Agreement, the Participant/nominated representative, will provide their NDIS plan details, and NDIS Number to <i>Aver Plan Managers</i>.</p>
Schedule of supports	<p><i>Aver Plan Managers</i> agrees to provide the Participant financial intermediary services, and Plan Management Services. The supports and their prices are set out in the attached Schedule of Supports. All prices are GST inclusive (if applicable) and include the cost of providing the supports. Additional expenses (i.e. things that are not included as part of a Participant's NDIS supports) are the responsibility of the Participant/nominated representative and are not included in the cost of the supports.</p>
Responsibilities of Provider	<ul style="list-style-type: none"> • Provide financial intermediary services • Reconcile client balances • Pay supplier invoices on behalf of client • Process client reimbursement claims • Track expenditure against client budget • Provide monthly statements of expenditure and available funding upon request • Assist with purchases where appropriate • Trouble shooting • Client liaison - emails, phone calls etc • Consult the Participant/nominated representative on request, regarding decisions about how funds are spent • Communicate openly and honestly in a timely manner

Service Agreement

Responsibilities of Participant/nominated representative

- Treat the Participant/nominated representative with courtesy and respect
- Listen to the Participant/nominated representative's feedback and resolve problems quickly
- Protect the Participant's privacy and confidential information as per *Aver Plan Managers Privacy Policy* available on the *Aver Plan Managers website*.

I agree to:

- Take due steps to provide information as requested by *Aver Plan Managers* in a timely manner
- Treat *Aver Plan Managers* staff with courtesy and respect
- Discuss any concerns about our service with *Aver Plan Managers*
- Advise *Aver Plan Managers* immediately if the Participant's NDIS plan is suspended or replaced by a new NDIS plan, or the Participant stops being a participant in the NDIS.

Aver Plan Managers will claim directly from the NDIA an agreed monthly fee for the provision of support as agreed in Schedule of Supports - Improved Life Choices (Support Category 14), upon acceptance of the service agreement. By nominating *Aver Plan Managers* to provide plan management services and manage the funding we will claim from the NDIA portal for funding up to the amounts specified in the support category and budget approved in the Participant's current NDIS plan. After these supports are delivered, the service provider or Participant/nominated representative will claim payment for those supports from *Aver Plan Managers* - by forwarding an invoice to accounts@averplanmangers.com.au

Service Agreement	
Participant budgets to be managed	<p>The Participant/nominated representative will provide <i>Aver Plan Managers</i> details of their support budgets as per the Participant's current NDIS plan.</p> <p>If the support categories or budgets change, the Participant/nominated representative agrees any changes will be submitted immediately in writing to <i>Aver Plan Managers</i>, signed, and dated by the Participant/nominated representative.</p>
Changes to the Plan	<p>The Participant/nominated representative, agrees to immediately notify <i>Aver Plan Managers</i> and provide relevant plan details in writing, if the Participant's NDIS Plan is replaced by a new plan, or the Participant ceases to be a participant in the NDIS.</p>
Ending this Service Agreement	<p>Should either Party wish to end this Service Agreement they must give one month's notice in writing. If either Party seriously breaches this Service Agreement the requirement of notice will be waived.</p>
Feedback, complaints and disputes	<p>If the Participant/nominated representative wishes to provide feedback, or is not satisfied with the provision of supports and wishes to make a complaint, the Participant/nominated representative can contact <i>Justine Hall or Mahrienne Haughey on 08 7200 0025 or by email hello@averplanmanagers.com.au</i></p>
Goods and Services Tax (GST)	<p>For the purposes of GST legislation, the Parties confirm that:</p> <ul style="list-style-type: none"> • A supply of supports under this Service Agreement is a supply of one or more of the reasonable and necessary supports specified in the statement included, under subsection 33(2) of the <i>National Disability Insurance Scheme Act 2013</i> (NDIS Act), in the Participant's NDIS plan currently in effect under section 37 of the NDIS Act; • Aver Plan Managers will pay GST as per specified in <i>National Disability Insurance Scheme Act 2013</i> (NDIS Act)



Service Agreement

Contact and Banking

The Participant/nominated representative will provide bank details if necessary, to Aver Plan Managers for reimbursement.

The Provider can be contacted on:

Mahrienne Haughey, 0466629935

Level 1, Suite 2, 16-18 Unley Rd, Unley 5061

Mahrienne@averplanmanagers.com.au

Schedule of Supports

- Financial Intermediary Set-up costs (14_033_0127_8_3)
- Initial consultation
- Loading of client details into client management system
- Receipt of funding
- Setting up client account within finance system
- Loading plan
- Setting service
- Budget allocation **\$218.27** once off

Financial Intermediary monthly processing
(14_034_0127_8_3)

- Reconciling client balances
 - Paying supplier invoices on behalf of client
 - Processing client re-imbusement claims
 - Tracking expenditure against client budget
 - Monthly statements of expenditure and available funding
 - Assisting with purchases
 - Trouble shooting
 - Client liaison - emails, phone calls etc **\$98.12 per month**
- capacity building funding: \$1395.71**

Aver Plan Managers may also charge:

Plan Management activities (14_031_0127_8_3)

- Setting up and Undertaking regular liaison with providers and monitoring **\$54.13 per hour**

Service Agreement

Name of Participant / Nominated representative

Signed

Date

Disclaimer

Aver Plan Managers information is provided in good faith, to the best of our knowledge and is considered to be correct at the time of communicating, however, changes may affect this accuracy therefore Aver Plan Managers gives no assurance as to the accuracy of any information or advice given.

Any advice given by Aver Plan Managers outside of financial intermediary advice shall be considered general in nature.

Aver Plan Managers shall not be liable for any failure of, or delay in the performance of this service agreement for the period that such failure or delay is;

- 1. Beyond the reasonable control of a party,*
- 2. Materially affects the performance of any of its obligations under this agreement, and*
- 3. Could not reasonably have been foreseen or provided against*

(eg. Government Acts prohibiting or impeding any party from performing its respective obligations under the Service Agreement contract) or (eg. prolonged lack of power supply).

Nothing in the Aver Plan Managers service agreement negates or diminishes the statutory guarantees regarding the supply of services the Participant/nominated representative receive under The Australian Consumer Law (Competition and Consumer Act 2010-Schedule2)

Aver Plan Managers takes in good faith the information provided by the Participant/nominated representative to be true and accurate, and that claims presented to Aver Plan Managers are a true reflection of goods and services provided to the Participant in line with the NDIS guidelines (National Disability Insurance Scheme Act 2013).



Notes