

Scholarship Agreement

Details of the Parties, the Scholarship and the Funding

Parties	
FPA (us, we, our)	<p>LSFP Pty Ltd trading as Swell Financial Planning ABN 79 625 779 482</p> <p>Address: 45 Nerang St, Southport QLD 4215</p> <p>Contact: Luke Shrewsbury</p> <p>Email: hello@swellfp.com.au</p> <p>Phone: 07 5554 8581</p>
Scholarship	
Title	Swell CQ Talent Scholarship 2025
1. Scholarship Award	<p>1.1 Amount: The Recipient will be awarded a \$5,000 scholarship ("Scholarship Award").</p> <p>Swell Financial Planning retains the right to vary the scholarship amount, its award and the distribution method at their discretion.</p> <p>1.2 Purpose: The Scholarship Award is to be used exclusively for furthering the Recipient's academic or sporting pursuits. This may include, but is not limited to, tuition fees, training programs, equipment, travel expenses, or any other related educational or sporting expenses.</p>
2. Eligibility & Requirements	<p>2.1 Eligibility: The Recipient confirms that they meet the following eligibility criteria:</p> <ul style="list-style-type: none"> • They are a high school student residing in Central Queensland. • They have demonstrated excellence in either academic or sporting fields, as indicated in their application. <p>2.2 Ongoing Academic or Sporting Commitment: The Recipient intends to maintain continued academic or sporting excellence throughout the duration of their studies, as this was a key factor in the awarding of the Scholarship.</p>
3. Use of Scholarship Funds	<p>3.1 Appropriate Use: The Scholarship Award must be used for educational or sporting purposes, including but not limited to:</p> <ul style="list-style-type: none"> • Tuition or course fees • Academic books and supplies • Sports equipment and gear • Travel and accommodation costs related to sporting events or competitions • Training or coaching fees

	<p>3.2 Proof of Use: The Recipient agrees to provide Swell Financial Planning with receipts or other proof of how the funds are being used, if requested.</p>
<p>4. Availability and Timeline</p>	<p>The Scholarship is currently awarded on a one-off basis, <i>(with a view to be on an annual basis)</i>.</p> <p>Initial Applications to open: 1 March, 2025</p> <p>Initial Applications to close: 4 April, 2025</p> <p>Shortlist of Applicants to be Contacted by 1 June 2025.</p> <p>Shortlisted applicants may be required to provide additional information to verify their achievements.</p> <p>Scholarships will be awarded: 1 September, 2025</p> <p>Outcome will be announced: 15th September, 2025</p> <p>Press Release & via Social Media (included but not limited to LinkedIn, Instagram & Facebook)</p>
<p>5. Scholarship Disbursement</p>	<p>4.1 Payment Schedule: The Scholarship Award will be disbursed on 1st September 2025, or as soon as practicable thereafter.</p> <p>The awardee has the option of receiving the funds via EFT, or can have a Futurity Bond established by Swell Financial Planning in the name of the successful applicants/parent of applicant, with an initial lump sum contribution of \$5K at the time of awarding to the successful recipients to use toward their ongoing educational/sporting journey at any Institution.</p> <p>Please note: The costs of a Futurity Bond will reside with the applicant/parent. These will be available in the relevant Product Disclosure Statement.</p> <p>No personal advice will be provided as part of the Scholarship Award, and the Bond will be established on a General Advice basis only.</p> <p>The applicant acknowledges they have had the opportunity to obtain independent professional advice (including legal, financial and tax advice) before entering this Agreement.</p>
<p>6. Publicity and Acknowledgement</p>	<p>6.1 Publicity: By accepting the Scholarship, the Recipient agrees to participate in any publicity or promotional activities related to the Scholarship, including social media posts, press releases, and any other materials created by Swell Financial Planning.</p> <p>6.2 Acknowledgment: The Recipient agrees to acknowledge Swell Financial Planning as the sponsor of the Scholarship in any publications, presentations, or other relevant materials associated with their academic or sporting endeavors.</p>

7. Liability and Indemnity	<p>7.1 Limitation of Liability: Swell Financial Planning will not be held liable for any damages, injuries, or losses incurred by the Recipient in relation to the use of the Scholarship Award.</p> <p>7.2 Indemnity: The Recipient agrees to indemnify and hold harmless Swell Financial Planning from any claims, damages, or costs arising from their participation in the Scholarship Program.</p>
8. Selection Criteria	<p>8.1 Applicants will be assessed holistically on a detailed situational report including:</p> <ul style="list-style-type: none"> - A brief background of sporting or academic achievements - Tell us why you feel you should be considered to receive this Scholarship and how it will benefit you now and in the future. - Supporting documentation to be provided by the applicant at time of application. <p>Additionally, a judging criteria exists for the purpose of subjectively scoring applicants based on their expertise in their field, ie Academic or Sporting Achievement, Leadership & Community Involvement as well as Character & Integrity.</p> <p>8.2 All decisions are final and no correspondence will be entered into.</p>
9. Miscellaneous	<p>9. Miscellaneous</p> <p>9.1 Governing Law: This Agreement will be governed by the laws of Queensland, Australia.</p> <p>9.2 Amendments: This Agreement may only be amended or modified in writing and signed by both parties.</p> <p>9.3. Termination: Swell Financial Planning may terminate the Scholarship offer at any stage by giving written notice to the applicants.</p>
10. Other Responsibilities	<p>Swell Financial Planning will manage all confidential documents and will safely dispose of the applications within appropriate timeframes or at the express request of applicants..</p>

Executed on behalf of Swell Financial Planning by its authorised signatory:



Signature



Luke Shrewsbury
Director