



## PLATO INVESTMENT MANAGEMENT WOMEN IN FINANCE SCHOLARSHIP CONDITIONS OF AWARD

### 1. INTRODUCTION

Each year the Research School of Finance, Actuarial Studies and Statistics ('RSFAS'), College of Business and Economics ('CBE') may offer an award known as the Plato Investment Management Women in Finance Scholarship ('the Award').

The objective of the award is to support students who identify as women who are undertaking an undergraduate program at the College of Business and Economics ('CBE'). There is an additional opportunity for the Award recipient to complete a paid internship at Plato Investment Management Ltd in Sydney providing a real-world experience to complement the complex research skills learnt on campus.

Funding for this Award has been provided by Dr Don Hamson, Plato Investment Management Ltd.

### 2. BENEFITS

The value of the Award is stated in your letter of offer. The duration of the Award is for up to two years. The Award is paid in equal instalments after each census date unless otherwise stated in the letter of offer.

The recipient is responsible for making payment of all tuition fees by the prescribed date as set out by the University each session. Recipients of the Award are responsible for the costs of books, study materials, accommodation and all other costs of study.

### 3. ELIGIBILITY

The Award is available each year to a continuing ANU student who:

- (a) is a domestic student; and
- (b) identifies as a woman; and
- (c) is studying in the Bachelor of Finance (BFIN) or in a CBE undergraduate degree with a Finance major (single or flexible double degree); and
- (d) has completed at least 24 units in a [Finance major](#); and
- (e) if in a single undergraduate degree, has completed a minimum of 48 units (equivalent to one year of full-time study) for the Bachelor of Finance or in a CBE undergraduate degree with a Finance major; or
- (f) if in a flexible double undergraduate degree, has completed a minimum of 96 units (equivalent to two years' full-time study) for the Bachelor of Finance or in a CBE undergraduate degree with a Finance major; and
- (g) has achieved at least a 5.0 ANU Grade Point Average (GPA) in the relevant undergraduate program.

#### **4. APPLICATION**

The application is submitted on the prescribed form. Any requirement for supporting documentation and forwarding details will be stated on the application form and/or ANU Scholarships website. The application and all supporting documentation (where applicable) must be submitted on or prior to the closing date published on the ANU Scholarships website.

#### **5. SELECTION**

Only applicants who meet all the eligibility criteria will be considered. Selection is made on the basis of completion or intention to enrol in a Student Managed Fund (SMF) course (FINM3009 and FINM3010)

If there are still more equally ranked applicants than there are Awards available, preference may be given (in order of priority) to students:

- a. with the highest overall Weighted Average Mark (WAM); or
- b. who, in their responses for the Award application, have convincingly demonstrated an interest in pursuing a career in investment management or the financial services industry more broadly; or
- c. who have achieved the highest WAM for the SMF courses already undertaken.

The Award is offered to a student by a selection committee chaired by the Director of RSFAS (or nominee) which will also include the RSFAS Deputy Director (Education) and the Student Managed Fund Course Convenor.

The selection committee reserves the right to make no award if it considers there is no applicant of sufficient merit. The selection committee may also vary the number of Awards and/or offer the Award at other times in exceptional circumstances or based on the standard of applications or students (where funds allow).

#### **6. CONCURRENT HOLDING OF AWARDS**

A recipient of the Award is permitted to hold concurrent student financial awards as outlined in the ANU coursework scholarships, grants and bursaries procedure.

#### **7. DEFERMENT**

The Award cannot be deferred.

#### **8. ONGOING ELIGIBILITY**

A recipient of this Award is required to enrol in a full-time load of 18 to 24 units per semester. A recipient requests permission, in writing, from the RSFAS Director to hold the Award on a part-time basis. If approved, payments of the Award will be made on a pro-rata basis.

Recipients are expected to maintain a GPA of 5.0 or above each semester (with the average being across all courses taken in a particular semester or session/s overlapping that semester).

If a recipient is unable to achieve the GPA in any semester a formal warning is sent.

If the recipient does not meet the required GPA in a subsequent semester they risk having their Award suspended or terminated.

A recipient is given the opportunity to explain their performance and how their performance can be remedied before a decision on the suspension or termination of an Award is made.

#### **9. CESSATION OF AWARD**

The Award ceases or should be surrendered:

- (a) if a student no longer meets the eligibility requirements;

- (b) at the conclusion of the period outlined in section 2;
- (c) on the date on which the recipient withdraws or ceases to attend the University other than for approved absences;
- (d) if a recipient fails to enrol as required in section 8;
- (e) if a recipient changes to part-time enrolment without receiving permission to retain the Award;
- (f) if a recipient changes their program or course without permission to retain the Award;
- (g) if a recipient fails to meet the minimum academic performance requirements; or
- (h) if a recipient breaches academic or behavioural standards set by the University under the Academic Integrity Policy and/or the Discipline Rule;

whichever is earliest.

#### **10. REPAYMENT OF FUNDS**

Subject to the information available at the time, the Dean of the College (or nominee) may request that the payment for the semester in which the breach of conditions or withdrawal occurs be refunded in part or in full.

#### **11. PROVIDING FALSE OR MISLEADING INFORMATION**

Selection for the Award is based on the information provided to the University. The Award may be withdrawn at any stage if incorrect, false or misleading information is provided or relevant information is withheld. This includes circumstances where the false information is unrelated to the assessment for the Award.

#### **12. TAXATION**

Recipients are responsible for seeking independent taxation advice regarding their own individual circumstances. Student financial awards are regarded as taxable income if a recipient is enrolled on a part-time basis. If you are receiving Centrelink benefits, student financial awards may impact your Centrelink payments.

For more information, visit

- <https://www.ato.gov.au/Calculators-and-tools/Host/?anchor=IMST&anchor=IMST&anchor=IMST/questions#IMST/questions>
- <https://www.servicesaustralia.gov.au/income-from-scholarships-for-students-and-apprentices?context=43921>

#### **13. ACCOMMODATION**

It is the recipient's responsibility to obtain residential accommodation. Information on student accommodation and application forms are available from the University Accommodation Services. Information may be found on the Web at:

<http://study.anu.edu.au/accommodation>

#### **14. PUBLICITY**

The recipient may be requested to participate in publicity for the Award from time to time. This may include publicity in the state or territory of residence or of schooling. Recipients may be contacted for an interview and photograph. The University may also publicise the Award by publishing the names of the recipients. Arrangements for such publicity will be made through the Research School of Finance, Actuarial Studies and Statistics or ANU Communications and Engagement (ACE).

#### **15. DISCLOSURE AND DONOR CONTACT**

For the purposes of reporting on the impact of student financial awards, the name, program name and demographics (for example: age, country or town of residence) relating

to a recipient of the Award may be disclosed to donors supporting the Award. This will not include recipient contact details. The recipient may be asked to write a personal note of thanks or to meet with donors. Any contact between a donor and a recipient will be facilitated by the ANU Advancement Office or an authorised representative of the University.

#### **16. CONTACT WITH THE AWARD OWNER**

All enquiries regarding the Award and changes, issues, or further information after acceptance should be made to:

*Scholarships & Prizes Office*

*ANU College of Business and Economics*

Email: [scholarships.cbe@anu.edu.au](mailto:scholarships.cbe@anu.edu.au)

#### **17. DISCLAIMER**

The recipient of the Award is subject to *The Australian National University Act 1991* as amended, and to the Statutes, Rules, Regulations and Resolutions of the University.

The Award does not carry any commitment by the University for future employment.

These Conditions of Award should be read in conjunction with the University's student financial awards policy and coursework scholarships, grants and bursaries procedure available from the ANU website.

#### **18. RELATED POLICIES, PROCEDURES & RULES**

ANU Student Financial Awards Policy -

[https://policies.anu.edu.au/ppl/document/ANUP\\_007803](https://policies.anu.edu.au/ppl/document/ANUP_007803)

ANU Coursework Scholarships, Grants and Bursaries Procedure -

[https://policies.anu.edu.au/ppl/document/ANUP\\_009607](https://policies.anu.edu.au/ppl/document/ANUP_009607)

ANU Academic Integrity Policy - [https://policies.anu.edu.au/ppl/document/ANUP\\_6477101](https://policies.anu.edu.au/ppl/document/ANUP_6477101)

ANU Discipline Rule - <https://www.legislation.gov.au/Details/F2021L00998>