



Master of Science in Taxation Enrollment Agreement

Washington Institute for Graduate Studies

University Town Center, 4660 La Jolla Village Drive, Suite 500, San Diego, CA 92122
Phone: 858-546-2838 Fax: 858-535-4890 E-Mail: info@wsltax.org Web address: www.wsltax.org

STUDENT INFORMATION

First Name _____ Middle Name _____ Last Name _____
Street Address _____ City _____
State _____ Zip _____ Country _____ Date of Birth _____ SS# _____
Home Phone _____ Work Phone _____ Fax _____
Cell Phone _____ E-Mail Address _____

Female Male Transcript Included? Yes No *NOTE: Transcript MUST be received within 60 days (only showing Bachelor's Degree)*

LIST OF DEGREES CONFERRED (do not list other non-degree studies)

DEGREE	MAJOR	SCHOOL	DATE

BACKGROUND INFORMATION

Licensing Information (If more than two, please list below, or attach an additional sheet)

Your Title	License#	Name of Licensing Board	Phone

List any background experiences, training, occupational licenses, awards, honors, scholarships, professional certificates, professional associations, or other information that gives evidence of your ability to complete the studies for which you are applying.

OCCUPATIONAL INFORMATION (In addition to the information below, please attach a resume)

Present Occupation: _____ How Long? _____
Name of Business or Employer: _____ How Long? _____
Business/Employer Address: _____ Best Time to Contact: _____

WHERE DID YOU FIND OUT ABOUT OUR SCHOOL (please circle)?

School Website (resulting from internet search) _____
Referral? Please specify: _____
Trade Group? Please specify: _____
Trade Journal? Please specify: _____
Card Deck? Which one? _____
Other? Please specify: _____

TUITION/FEES (see Taxation Bulletin for full details)

Non-refundable Enrollment Fee: \$50 (must accompany this agreement)
Tuition: \$14,900 (specify payment plan below)
One-time Tuition Finance Fee: 2.63% (24 mo) or 5.26% (36 mo)
One-time Course Shipping/Handling: \$250
Transcript Fee (first two provided at no charge): \$10
Fee per semester unit (to retake a course): \$75
Optional Online Tax Library: \$299 (annual subscription)

Insufficient Funds Fee: \$35
Late Payment Fee: \$20
Additional Diploma Fee: \$75
Required Texts: At Cost (not purchased through school)
Transfer Student Evaluation Fee: \$75
One-time Shipping Surcharge (Int'l Students): \$500
California STRF Fee: \$2.50 per \$1,000 of tuition (*)

(*) see California STRF Fee within the "Disclosures" section of this agreement.

PAYMENT PLAN (***MUST** Select One*)

- Pay in Full** - A student may receive a 10% discount on tuition if the full amount is paid at the time of matriculation into the program (*this discount may not be combined with other offers and/or discounts*).
- Monthly Installments** – Under this option, a finance charge will be assessed and added to the tuition balance upon matriculation. The student is allowed to make equal, monthly installments for no more than 36 months until fully paid. The initial monthly payment is due once the student has been accepted and matriculated into the program, specifically prior to shipment of course materials. Subsequent monthly installments are processed on the 1st of each month (*if paid by credit card*) or the 15th of each month (*if paid by ACH. . .automatic bank account debit*). **MUST** select one below if making monthly installments.
 - I want to make 24 payments (plus a one-time 2.63% finance charge)*
 - I want to make 36 payments (plus a one-time 5.26% finance charge)*

Tuition Promotion: – Proof of promotion is required and must be attached (*i.e., copy of your email*).

To Be Completed by Washington Institute Staff Only: Promotion Name/Code: _____ Tuition Amt/Terms: _____

- Online Tax Library** (*optional annual subscription*): \$299 (@) _____
(MUST Initial Here)

(@) *The subscription is for the expanded version of RIA Checkpoint, which includes federal, state, local, and international tax components (as well as a variety of useful business/practice tools). No refunds once a username/password has been sent to the student. See Bulletin for more details.*

PAYMENT METHOD (***MUST** Select One*)

- Credit Card Option. Credit Card Type:** **Master Card** **American Express** **VISA** **Discover**
Credit Card # _____ Expiration Date: _____
Name on Card: _____ Billing Address: _____

- Electronic Withdrawal from Bank Account Option** **Checking Account** **Savings Account**
(PLEASE ATTACH A VOIDED CHECK) Your Financial Institution Name (Depository): _____
Transit (ABA) #: _____ Account #: _____

I hereby authorize Washington Institute to initiate debit entries and if necessary credit the same to the above named financial institution and account. This authorization is to remain in full force and effect until Washington Institute has received written notification from me of its termination in such time and in such manner to afford Washington Institute and Depository a reasonable opportunity to act on it.

Name (print): _____ Authorized Signature: _____ Date: _____

REQUIREMENTS OF THE PROGRAM (see *Taxation Bulletin* for full details). Those who have their Bachelor’s Degree in a field relating to accounting, tax, or law; or those licensed to practice law who have their JD degree are qualified to enter into the program. A student must successfully complete 24 semester units and pay any outstanding tuition/fee balances in order to graduate.

CERTIFICATIONS. The institution is not accredited by a regional or national accrediting agency recognized by the U.S. Department of Education – which does not require educational institutions in the US to become accredited; it is a voluntary process in the United States. For more information regarding our certification, please visit our website at: www.wsltax.org and click on *Taxation Bulletin* for full details.

A STUDENT’S RIGHT TO CANCEL & THE REFUND POLICY. Because courses are transmitted to the student within seven days of acceptance into the program, if a student wishes to cancel and withdraw from the program, (s)he may do so with no further obligation and receive a refund, if the school has received written notice within seven business days after the date of acceptance. A written statement must be received by mail, email, or fax to meet these terms. If a student would like to withdraw within the seven day period and a course has already been shipped to the student, the course must be returned and unopened within fourteen days, or the student will remain obligated. If the student meets these conditions, all money paid towards tuition and shipping and handling will be refunded pursuant to 5 CCR §71750 of the California Code. **Please Note:** In order for the refund policy to apply, the date postmarked on the envelope or the date on the fax transmittal or email of the written statement must be within the required time period stated above.

LOANS AND STUDENT RESPONSIBILITY. Washington Institute does not accept federal student financial aid funds. However, if the student obtains a loan to pay for an educational program, the student will have the responsibility to repay the full amount of the loan plus interest, less the amount of any refund. If the student is eligible for a loan guaranteed by the federal or state government and the student defaults on the loan, both of the following may occur. (1) The federal or state government or a loan guarantee agency may take action against the student, including applying any income tax refund to which the person is entitled to reduce the balance owed on the loan. (2) The student may not be eligible for any other federal student financial aid at another institution or other government assistance until the loan is repaid.

WITHDRAWAL/DISMISSAL. Students who have not made their scheduled payment(s) may be withdrawn from the program. Students who have made their payment(s), but have not ordered any course work in a year’s time may be withdrawn. Students who have made payment(s) and have not completed the program within five years will also be withdrawn. A student that violates the honor code may also face dismissal. If the student falls outside the five year time-frame, he/she may be eligible to reinstate, but may be subject to prevailing tuition and/or reinstatement rates/fees.

DISCLOSURES: Unfortunately at this stage, if a prospective student is unfamiliar and/or not fluent in the English Language (as determined by a minimum TOEFL score of 620 on the paper-based test and 105 on the internet-based test, a minimum score of 875 on the TOEIC, OR a 7.0 or higher on the IELTS), the prospective student may not enroll in the program, since all our courses are only offered in English.

Unless otherwise agreed upon, the period covered by this agreement is five years from the date the student is admitted into the program (which constitutes the official start date of the program). Washington Institute shall transmit all lessons and materials to the student if the student has fully paid for the educational program and, after having received the first lesson and materials, requests in writing that all of the materials be sent. If Washington Institute transmits the balance of the materials as the student requests, Washington Institute shall remain obligated to provide other educational services agreed upon, but shall not be obligated to pay any refund after all of the lessons and materials are transmitted.

California STRF Fee. A special fund was established by the California Legislature to reimburse students who might otherwise experience a financial loss as a result of untimely school closure. Institutional participation is mandatory. Students must pay the state-imposed fee for the Student Tuition Recovery Fund (STRF) if all the following applies to you:

1. You are a student who is a California resident and prepays all or part of your tuition by cash, guaranteed student loans, or personal loans, and
2. Your total charges are not paid by any third party payer such as an employer, government program or other payer unless you have a separate agreement to repay the third party.

You are not eligible for protection from the STRF and you are not required to pay the STRF fee if either of the following applies:

1. You are not a California resident, or
2. Your total charges are paid by a third party, such as an employer, government program, or other payer and you have no separate agreement to repay the third party.

It is important that enrollees keep a copy of any enrollment agreement, contract, or application to document enrollment, tuition receipts, or canceled checks. They are encouraged to document the total amount of tuition paid and records that will show the percentage of the course which has been completed. Such records would substantiate a claim for reimbursement from the STRF, which, to be considered, must be filed within sixty (60) days following school closure. STRF fees are \$2.50 per \$1,000 of tuition.

Prior to signing this enrollment agreement, you must be given a catalog (Bulletin) and a School Performance Fact Sheet, which you are encouraged to review prior to signing this agreement. These documents contain important policies and performance data for this institution. This institution is required to have you sign and date the information included in the School Performance Fact Sheet relating to completion rates, placement rates, license examination passage rates, and salaries or wages, prior to signing this agreement.

(Initial) I certify that I have received the catalog, School Performance Fact Sheet, and information regarding completion rates, placement rates, license examination passage rates, and salaries or wages included in the School Performance Fact Sheet, and have signed and dated the information provided in the School Performance Fact Sheet.

Any questions a student may have regarding this enrollment agreement that have not been satisfactorily answered by Washington Institute may be directed to the Bureau for Private Postsecondary Education at 2435 Capitol Oaks Drive, Suite 400, Sacramento, CA 95833, 916-431-6959 or 888-370-7589, www.bppe.ca.gov or bppve@dca.ca.gov. Washington Institute publishes a complaint resolution policy within all of the school catalogs/bulletins. However, a student or any member of the public may file a complaint about Washington Institute with the California Bureau for Private Postsecondary Education by calling 888-370-7589 or by completing a complaint form, which can be obtained on the bureau's internet website at www.bppe.ca.gov.

NOTICE CONCERNING TRANSFERABILITY OF CREDITS AND CREDENTIALS EARNED AT OUR INSTITUTION. The transferability of credits you earn at Washington Institute is at the complete discretion of an institution to which you may seek to transfer. Acceptance of the degree you earn in the tax program is also at the complete discretion of the institution to which you may seek to transfer. If the credits or degree that you earn at Washington Institute is not accepted at the institution to which you seek to transfer, you may be required to repeat some or all of your course work at that institution. For this reason you should make certain that your attendance will meet your educational goals. This may include contacting an institution to which you may seek to transfer, after attending Washington Institute, to determine if your credits or degree will transfer.

CONTRACT TERMS AND CONDITIONS. I understand that this is a legally binding contract. My signature below certifies that I have read, understood, and agreed to my rights and responsibilities, and that the institution's cancellation and refund policies have been clearly explained to me. Further, I have read and understand the terms of the withdrawal and dismissal policies stated in this contract and the *Taxation Bulletin*. I promise to pay the tuition and fees as specified in this enrollment agreement. All tuition and fees must be paid in full before I can graduate. I have a copy of the most recent *Bulletin* or have gone to the Website for the on-line version and have read its contents pertaining to this degree carefully. I am bound by its conditions and rules. If I fail to timely pay, then Washington Institute will enforce the terms of the Withdrawal/Dismissal Policy and collect the amount owed, plus all collection costs, and reasonable attorney fees. I consent and submit myself to the jurisdiction of (a) any arbitrator appointed by Washington Institute, for binding, mandatory arbitration under any informal procedural rules that the arbitrator deems appropriate, and/or (b) the courts of the state of Utah and/or California, and I consent to personal service of process or by certified mail, return receipt requested, addressed to my name at my work or residential address. I have also read and understand the requirements of the Master of Science in Taxation Program.

TOTAL CHARGES REQUIRED UPON ENROLLMENT: \$ _____
ESTIMATED TOTAL CHARGES FOR THE ENTIRE PROGRAM: \$ _____
TOTAL CHARGES FOR THE CURRENT PERIOD OF ATTENDANCE: \$ _____

Student Signature _____ Date _____

Institution Representative _____ Date _____