

# Service Agreement



This agreement engages CAPA Services to provide Centrelink Administration services. CAPA Services is not licensed to provide financial advice and cannot advise on financial products or structures.

However, we can offer strategic solutions related to Centrelink issues.

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## Our Commitment to You

At CAPA Services, we leverage over 30 years of experience with Centrelink's complex systems to represent your best interests with integrity. While delays or errors can occur due to the complexity of Centrelink's processes, we are committed to resolving any issues efficiently.

### Professional Standards

During the term you engage our services, we will:

- Act as your representative to Centrelink.
- Provide services consistent with professional standards.
- Always act in your best interests.

### Updating Your Information

Centrelink requires regular updates to your bank account balances and investment values. We will:

- Work within Centrelink's guidelines to update your records at reasonable intervals.
- Collaborate with your other professionals (e.g., Financial Advisers, Accountants, Bookkeepers, or Investment Managers) if authorised, to ensure your Centrelink file remains accurate.

### Specific Services

We will manage all Centrelink matters on your behalf, including but not limited to:

- Manage and update your Centrelink file, notifying Centrelink on any changes to your circumstances, including financial and lifestyle information.
  - Monitor Centrelink's assessments and payment adjustments for accuracy.
  - Act on your behalf to handle enquiries, correspondence, and resolve Centrelink issues if they arise.
  - Assist with completing Centrelink forms and answer any questions regarding your payments or entitlements.
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## Fees

We have standard fees that serve as a guide for the cost of our services. However, due to the complexities of working with Centrelink, some cases may require services outside these set fees.

### Additional Fees

No additional fees will be charged without prior disclosure and your agreement.

### Fee Increases

If there are any changes to our rates, we will provide 30 days' written notice.

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## Client Responsibilities and Limitations

You are responsible for ensuring that all information provided to us is complete, accurate, and true. Incomplete, incorrect, or late information (outside the required 14 days) may affect your Centrelink payments and result in debts, missed entitlements, or inaccurate assessments.

While CAPA Services will take reasonable care in managing your information, we are not liable for any outcomes arising from incomplete or inaccurate information provided by you.

Once information is submitted to Centrelink, we cannot control how it is assessed or how long it may take for processing.

### Release

You release CAPA Services from any claims, losses, liabilities, or damages resulting from incomplete or inaccurate information you provide.

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## Termination

### Our Right to Terminate

We may terminate this Agreement and cease providing services immediately if you fail to pay our accounts on time, upon written notice.

### Your Right to Terminate

You may terminate this Agreement and our services at any time by providing at least five days' written notice.

### Obligations on Termination

All fees paid are non-refundable upon termination of this Agreement.

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## General

### Confidentiality

With the exemption of Centrelink, we will not disclose any information you provide to third parties without your consent, except where required by law.

### Consent to Record

In the event that we need to record audio or video for legal compliance, training, or marketing purposes, we will always seek your consent before doing so. Currently, we do not record our interactions but include this clause to ensure transparency should the need arise.

### Newsletters and General Communications

You may receive quarterly newsletters and general emails from us, including updates about any changes within our company. If you no longer wish to receive these communications, please let us know, and we will promptly remove you from our mailing list.

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## Next Step

By signing the Centrelink Nominee form SS313 (Authorising a person or organisation to enquire or act on your behalf), and thereby authorising CAPA Services to act on your behalf with Centrelink, you agree to the terms of this Service Agreement.

## Refund Policy

Our goal is to provide a high-quality, professional service that supports clients through the complexities of Centrelink applications. We invest considerable time, expertise, and care into each case — whether or not a claim is ultimately submitted.

To ensure fairness and clarity, our refund policy is as follows:

### 1. Refund Eligibility

- A refund may be considered **only if the client withdraws prior to significant work commencing** (e.g. within 48 hours of payment and before documentation review begins).
- If a client withdraws after work has commenced — including review of documents, assessments, or consultations — **a partial refund may be offered at our discretion** based on the stage of work completed.

### 2. No Refunds Apply:

- If an application is withdrawn or delayed by the client after preparatory work has commenced.
- If a client changes their mind based on advice from third parties or changes in personal circumstances.
- Where eligibility is lower than expected but accurate based on available information.

### 3. Policy Discretion

- We aim to be fair and transparent. In some cases, we may offer a partial goodwill refund even where the policy would not require it. This is done to maintain goodwill and does not establish ongoing precedent.