



ENROLLMENT AGREEMENT

Bachelor of Science in Trust and Wealth Management

SAN DIEGO - IRVINE



**SOUTHERN STATES
UNIVERSITY**

All instruction provided at these locations:

San Diego Campus - 1094 Cudahy Place, Suite 120 San Diego, CA 92110 - Phone: (619) 298-1829

Irvine Campus – 2855 Michelle Drive, Suite 380, Irvine, CA 92606 - Phone: (949) 883-8868

Las Vegas Campus – 2000 S. Jones Blvd, Las Vegas, NV 89046 - Phone: (702) 786-3788

www.ssu.edu - info@ssu.edu

This enrollment agreement is provided in English as this is the only language the University utilizes. If English is not your primary language SSU will make every effort possible to have an interpreter on staff to assist with your understanding of the enrollment agreement, disclosures and statements impacting enrollment.

PLEASE PRINT

Name as it Appears on Passport or State Issued ID

Date of Application (MM/DD/YYYY)

Current U.S. Street Address

Telephone Number

City

Province/State

Postal Code

Country

Date of Birth (MM/DD/YYYY)

Place of Birth

Country of Citizenship

E-mail Address (Required)

Please Check All That Apply:

I am a United States citizen or permanent resident.

I am not a United States citizen or permanent resident.

I am studying under an F-1 Visa. SEVIS ID Number _____

PLEASE PRINT

Home Country Address

Home Country Telephone Number (Include Country Code)

City

Postal Code

Country

CAMPUS I WANT TO ATTEND:

Please Check One:

San Diego Campus: 1094 Cudahy Place, Suite 120 San Diego, CA 92110

Irvine Campus: 2855 Michelle Drive, Suite 380, Irvine, CA 92606

IMPORTANT DATES

Program Start Date: ____/____/____ Scheduled Completion Date: ____/____/____

Date to Cancel or Withdraw: ____/____/____
(MM/DD/YYYY)

URL: <http://www.ssu.edu/academics/academic-calendar/>

This enrollment agreement covers*: ____/____/____ to ____/____/____
(Contract Start Date) (Contract End Date) *5years after starting date

*The maximum timeframe this enrollment agreement will cover is equal to 1.5x the program length in accordance with Satisfactory Academic Progress requirements.

BASIC PROGRAM INFORMATION:

Bachelor of Science in Trust and Wealth Management	
Credit Hours:	180 Credit Hours
Program Length:	4 years

DISTANCE EDUCATION POLICIES

SSU offers a distance education program where the instruction is not offered in real time. The institution shall comply with the following: 1) the institution 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 initial materials, requests in writing that all of the material be sent; 2) if an institution transmits the balance of the material as the student requests, the institution shall remain obligated to provide the other educational services it agreed to provide, but shall not be obligated to pay any refund after all of the lessons and materials are transmitted. (5 CCR §71716 (c)(1)(2))

SSU offers a distance educational program where the instruction is not offered in real time. SSU shall transmit the first lesson and any materials to any student within seven (7) days after the institution accepts the student for admission. (5 CCR §71716(a)) Additionally, approximate seven (7) days will elapse between the institution's receipt of student lessons, projects, or dissertations and the institution's mailing of its response or evaluation back to the student. (5 CCR §71810 (b)(11))

STUDENT LOANS

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. Ed. Code §94911 (f)

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 act 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. Ed. Code §94911 (g)(1)(2)

NOTICE: YOU MAY ASSERT AGAINST THE HOLDER OF THE PROMISSORY NOTE YOU SIGNED IN ORDER TO FINANCE THE COST OF THE EDUCATIONAL PROGRAM ALL OF THE CLAIMS AND DEFENSES THAT YOU COULD ASSERT AGAINST THIS INSTITUTION, UP TO THE AMOUNT YOU HAVE ALREADY PAID UNDER THE PROMISSORY NOTE.

For any amount not covered by loans, SSU provides payment plan options to students as detailed below.

BACHELOR OF SCIENCE IN TRUST AND WEALTH MANAGEMENT REGULAR PAYMENT OPTIONS

Payment options		Number of payments	Estimated Total Tuition	Estimated Total Tuition and Fees	What is included
<input type="checkbox"/>	Payment in Full ^#	1 per program	\$24,750.00	\$25,840.00	Tuition = 180 credits x \$137.50 = \$24,750.00 General Library Fee = 14 qtrs. x \$75.00 = \$1,050.00 Technology Fee = \$40.00 Total = \$25,840.00
<input type="checkbox"/>	Quarterly ^#	1 per quarter	\$24,750.00	\$26,360.00	Tuition = 180 credits x \$137.50 = \$24,750.00 General Library Fee = 14 qtrs. x \$75.00 = \$1,050.00 Technology Fee = 14 qtrs. x \$40.00 = \$560.00 Total = \$26,360.00 <i>Ex: 13.5 credits + Processing = \$1,971.25/quarter</i>
<input type="checkbox"/>	Installments ^#	3 per quarter	\$24,750.00	\$27,480.00	Tuition = 180 credits x \$137.50 = \$24,750.00 General Library Fee = 14 qtrs. x \$75.00 = \$1,050.00 Technology Fee = 14 qtrs. x 3 installments x \$40.00 = \$1,680.00 Total = \$27,480.00 <i>Ex: 13.5 credits + Processing = \$683.75/installment</i>
<input type="checkbox"/>	**Limited-Time Offer	1 Payment per Month	Tuition Savings \$20,349.00		Tuition = 180 credits x \$113.05 = \$20,349.00 ^^ General Library Fee = 14 qtrs. x \$75.00 = \$1,050.00 ^^^ Technology Fee = 51 payments x \$40.00 = \$2,040.00 <i>Tuition Monthly Amount = \$399.00 (+ Fees)</i>

^ Any outstanding balance with SSU must be paid in full in order to Petition for Graduation.
^^ General Library Fee = 14 qtrs. x \$75.00 = \$1,050.00 - to be paid at the beginning of each quarter
^^^ Technology Fee = 51 payments x \$40.00 = \$2,040.00
^^^^ Student Tuition Recovery Fund = \$13.00

**Limited-Time Offer- Check deadlines with admissions department.

*** In case of program withdrawal tuition savings is not applied, and payment will be calculated based on regular fees.

NOTE: All other fees must be paid at the time of service.

* Monthly payment: 51 X \$459.58

Note: Students wishing to change their BSTWM program enrollment from on-site to online (or vice versa), must contact the Registrar to complete a new enrollment agreement.

Student Initials

STUDENT'S RIGHT TO CANCEL

The student has the right to cancel the Enrollment Agreement and obtain a refund of charges paid for attendance through the first-class session or the seventh day after enrollment, whichever is later.

To cancel enrollment and/or obtain a refund, the student must provide written notice to the Office of the Registrar. If the student cancels the Agreement, the School will refund any money that s/he has paid, less any deduction for nonrefundable fees, and for any equipment not returned in good condition; within thirty days after his/her Notice of Cancellation is received.

If a student has received federal student financial aid funds, the student is entitled to a refund of moneys not paid from federal student financial aid program funds. SSU does not currently participate in federal aid programs.

To cancel enrollment and/or obtain a refund, the student must provide written notice to the Office of Registrar, Southern States University, by mail at 1094 Cudahy PI, Suite 120 San Diego, CA 92110 or by email at registrar@ssu.edu

STUDENT'S RIGHT TO CANCEL IN DISTANCE EDUCATION

The student in a distance education program that is not offered in real time shall have the right to cancel the enrollment agreement and receive a full refund before the first lesson and materials are received. Cancellation is effective on the date written notice of cancellation is sent.

To cancel enrollment and/or obtain a refund, the student must provide written notice to the Office of the Registrar. If the student cancels the Agreement, the School will refund any money that s/he has paid, less any deduction for nonrefundable fees, and for any equipment not returned in good condition; within thirty days after his/her Notice of Cancellation is received.

If the institution sent the first lesson and materials before an effective cancellation notice was received, the institution shall make a refund within 45 days after the student's return of the materials.

If a student has received federal student financial aid funds, the student is entitled to a refund of moneys not paid from federal student financial aid program funds. SSU does not currently participate in federal aid programs.

To cancel enrollment and/or obtain a refund, the student must provide written notice to the Office of Registrar, Southern States University, by mail at 1094 Cudahy Pl, Suite 120 San Diego, CA 92110 or by email at registrar@ssu.edu

STUDENT'S REFUND POLICY

Withdrawal may be effectuated by the student's written notice or by the student's conduct, including, but not necessarily limited to, a student's lack of attendance. Students who withdraw before 60% of a quarter is completed are eligible to receive a partial refund of tuition and fees paid. Students have a right to cancel their enrollment agreement and obtain a refund by submitting a *Withdrawal Form* to the Registrar's Office prior to the withdrawal deadline. Only when the completed *Withdrawal Form* has been submitted to the Registrar's Office does the withdrawal become official. The effective date used to determine a refund of fees will be based and computed from the last possible date of class attendance (regardless of whether the student attended).

Refunds will be made within 30 days of official withdrawal, or within 30 days of the date of the last possible day of the student's attendance. The refund distribution will be handled as prescribed by federal and state law, as well as according to accrediting body regulations. The refund procedure is uniformly applied to all students, regardless of the form of their tuition payment. In case of conflicting laws and/or regulations, Federal and/or State regulations will take precedence in that order. A student may receive a refund check only when the refund amount exceeds the balance that he/she owes to the University. The basis for refunds is as follows:

Students who cancel their registration and withdraw from the University on or before the first day of a term are eligible for a full refund of all fees paid for that term (and any future terms that have been prepaid) less the nonrefundable fees. For an example please see below:

$$\text{Refund Amount} = \text{All prepaid amounts} - (\text{non-refundable fees})$$

Students, who withdraw from the University after the first day of the term, but prior to completion of greater than 60% of the term currently enrolled in, are entitled to a refund on a prorated basis, less the non-refundable fees. Please see the example below:

$$\text{Refund Amount} = [(\text{All prepaid amounts for the courses being withdrawn from}) \times (\text{weeks left to be completed} / \text{total number of weeks in quarter})] - (\text{non-refundable fees})$$

If the (weeks left to be completed / total number of weeks in quarter) is less than 40%, then no refund is due to the student.

NOTICE CONCERNING TRANSFERABILITY OF CREDITS AND CREDENTIALS EARNED AT OUR INSTITUTION

The transferability of credits you earn at Southern States University is at the complete discretion of an institution to which you may seek to transfer. Acceptance of the credits or degree you earn in _____ 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 this institution are not accepted at the institution to which you seek to transfer, you may be required to repeat some or all of your coursework at that institution. For this reason, you should make certain that your attendance at this institution will meet your educational goals. This may include contacting an institution to which you may seek to transfer after attending SSU to determine if your credits or degree will transfer.

STUDENT TUITION RECOVERY FUND

"The State of California established the Student Tuition Recovery Fund (STRF) to relieve or mitigate economic loss suffered by a student in an educational program at a qualifying institution, who is or was a California resident while enrolled, or was enrolled in a residency program, if the student enrolled in the institution, prepaid tuition, and suffered an economic loss. Unless relieved of the obligation to do so, you must pay the state-imposed assessment for the STRF, or it must be paid on your behalf, if you are a student in an educational program, who is a California resident, or are enrolled in a residency program, and prepay all or part of your tuition.

You are not eligible for protection from the STRF and you are not required to pay the STRF assessment, if you are not a California resident, or are not enrolled in a residency program."

Questions regarding the STRF may be directed to the Bureau for Private Postsecondary Education, P.O. Box 980818, West Sacramento, CA 95798-0818, www.bppe.ca.gov, 1-800-370-7589.

PAYMENT METHODS

Credit Card:



Name on Card: _____
 Card Number: _____ Expiration Date: _____ CVV Number: _____
 Billing Address of the Card: _____ Phone Number: (____) _____
 Authorized Signature: _____

Check/Money Order

E check

Please make check payable to Southern States University, 1094 Cudahy Pl, Suite 120 San Diego, CA 92110 *(Note: Any check returned unpaid by the bank will incur a \$30.00 fee)*

Bank Wire Transfer:

Bank Name: Wells Fargo Bank	Account Number: 7655659501
Branch: San Diego - CA	Routing Number: 121000248
	SWIFT Code: WFBIUS6S
Wire Beneficiary: Southern States University	
1094 Cudahy Place, Suite 120 San Diego, CA 92110	
Phone: (619) 298-1829- Fax: (619) 704-0175.	

(Note: Wells Fargo Bank charges \$30.00 for the wire transfer fee. Be sure to include this amount to the total fee).

**The above payment method will be used to charge the initial fees (application, international registration, international enrollment and courier fees, if applicable). First quarter tuition is to be paid by the student one week before program starts.*

ACCEPTANCE OF ENROLLMENT AGREEMENT

I acknowledge that I am obligated to pay for the program of instruction selected, and for all other services and materials furnished or made available by the school, including any charges made by the school for books and supplies, and any other fees and expenses that I incur upon enrollment. I understand that I will not be able to graduate or receive my diploma prior to full payment of all fees and charges. If the payment plan extends beyond the program completion date, I agree that I am obligated to pay all fees and charges documented on the Fees and Charges page of this agreement, subject to the refund policy which is also documented in this agreement.

Any questions a student may have regarding this enrollment agreement that have not been satisfactorily answered by the institution may be directed to the Bureau for Private Postsecondary Education at 1747 North Market Blvd, Suite 225, Sacramento, CA 95834 , www.bppe.ca.gov, phone: (916) 431-6959, fax: (916) 263-1897.

A student or any member of the public may file a complaint about this institution with the Bureau for Private Postsecondary Education by calling (888) 370-7589 (toll free) or by completing a complaint form, which can be obtained on the bureau's Internet Web site www.bppe.ca.gov.

Prior to signing this enrollment agreement, you must be given a catalog or brochure 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, and the most recent three-year cohort default rate, if applicable, prior to signing this agreement.

Student Initials

I certify that I have received the Catalog, School Performance Fact Sheet, information regarding completion rates, placement rates, license examination passage rates, and salary or wage information, and the most recent three-year cohort default rate, if applicable, included in the School Performance Fact Sheet, and have signed, initialed, and dated the information provided in the School Performance Fact Sheet.

Student Initials

I am aware that the SSU General Catalog is located on SSU's website, www.ssu.edu, and is readily accessible to all students and the general public.

Student Initials

Catalog Signature:

I, _____ have received a copy of the aforementioned version of the catalog that I will be bound to and understand it is a part of the enrollment agreement. By signing below, I hereby acknowledge that I have reviewed the Catalog.

Signature

_____/_____/_____
Date (MM/DD/YYYY)

TOTAL CHARGES FOR THE CURRENT PERIOD OF ATTENDANCE *(according to chosen payment plan):* \$ _____

ESTIMATED TOTAL CHARGES FOR THE ENTIRE EDUCATIONAL PROGRAM *(total cost of your program):* \$ _____

TOTAL CHARGES STUDENT IS OBLIGATED TO PAY UPON ENROLLMENT *(enrollment fees):* \$ _____

^STUDENT TUITION RECOVERY FUND: The STRF for the BSTWM program is \$13.00 *(Due with the First tuition payment)*

This agreement is a legally binding instrument when signed by the student and accepted by the University.

Your signature on this agreement acknowledges that you have been given reasonable time to read and understand it, and that you have been given: (a) a written statement of the refund policy and (b) a chance to review the SSU General Catalog, including a description of the program of study and all material facts concerning the school which are likely to affect your decision to enroll. The SSU General Catalog can be found on SSU's home page at www.ssu.edu.

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. Upon acceptance, a copy of this agreement shall be sent to you for your records.

Student Name (Print)

Student Signature

Date (MM/DD/YYYY)

SSU Representatives Name (Print)

SSU Representatives Signature

Date (MM/DD/YYYY)