



Request for Plan Management

Attention: NDIA PLANNER

Re: PLAN MANAGEMENT - Improved Life Choices

Following a review of the options of managing funding within their plan - “Self-Managed”, “Agency Managed” or “Plan Managed”, the participant has decided to choose “Plan Managed”, and engage a professional Plan Manager to manage their NDIS funds and pay service providers on their behalf.

Please ensure the following support items are included in their plan to help them achieve their goals.

CB Choice & Control: 14_033_0127_8_3 (Financial Intermediary set up costs)

CB Choice & Control: 14_034_0127_8_3 (Financial Intermediary Monthly Processing x 12 months)

WHY CHOOSE PLAN HERO?

Plan Hero strives to support participants in finding the information they need to understand their NDIS plan and with making informed choices from the options available. We ease the stress of managing funding and assist with budget tracking to avoid overspending of funds.

Thank you

Note: This information does not reflect any expectation that the Participant will engage Plan Hero’s services. We encourage Participants to make their own enquiries with service providers to find the best option to suit their needs.