

## POLICY: Castaway Cancellation Policy BMS/ ISMS [External]

The Financier Software Pty Ltd (Castaway) Cancellation Policy explains who may cancel software subscriptions and the terms and conditions under which they can do so.

### Objectives and Background

Castaway is committed to providing the best software and supporting services, such as training, bureau support and consulting services in a timely manner. We aim to delight and exceed your expectations.

We have designed a straightforward cancellation policy and want all customers to understand all the implications of cancellation.

### Cancellation Process

We understand there might be very good reasons for customers to cancel software subscriptions, training attendance, regular bureau support and consulting services. We will honour your request for cancellation, even if our CS team might offer mitigating solutions for the very reasons you have decided to cancel.

The cancellation process and implications are as follows:

#### Software subscriptions

Account Owners (Organisation Owners) may cancel Castaway subscriptions in the Organisation Admin Portal within the Castaway application. Upon cancellation, stoppage of future payments is immediate, but access to the software and files will be allowed until the end of the current period a customer has paid. For instance, take a scenario where a customer has been paying a monthly subscription for several months and it next automatically renews on the 13<sup>th</sup> of October. If the same customer cancels on 26<sup>th</sup> September, the Organisation and its Users will still have access to the software and files until 12<sup>th</sup> October. On the 13<sup>th</sup> October, all Users in the Organisation will lose access to the software and all created files. It is important to understand that, after a short period of time, these files will be deleted **permanently**.

Account Owners can take cancellation a step further by electing to **Delete** their Organisation. Deleting an Organisation is a very serious and permanent action. This choice may be taken for several reasons, including customer data breaches, instruction from a legal team, liquidation of a business, or in the case of smaller firms, instruction from advisor clients. Deleting an Organisation is possible, but the implications include losing access to Organisation, User and File data. All this data is permanently deleted and can never be recovered.

#### Software training, consulting, or bureau services – online or in-person

If we deliver training courses, we will advertise these classes in advance and, because we limit class numbers in-person and online, we take payment in advance to generate some commitment.

Castaway may cancel training, change the date or time of training, or designate the training location change with advance notice. If Castaway cancels training, a full refund will be provided to any participant who has already paid.

If a participant is unable to attend the training or consulting time they registered for, the customer company is entitled to designate another representative from their company to participate in the training or consulting before the training begins. The client will incur no additional costs.

If a participant cancels their training or webinar registration, the following refund policy applies:

Cancellation Notice*	Refund Provided
5 working days or less prior to training	Nil
6-15 working days prior to training	50% refund OR transfer to the next available training course or webinar
16 or more working days prior to training	100% refund OR transfer to the next available training course or webinar

If a company cancels their consulting or bureau service, the following refund policy applies:

Cancellation Notice*	Refund Provided
5 working days or less prior to delivery	Nil. We will attempt to reschedule (once) for free
6 or more working days prior to training	100% refund OR reschedule

\*Must be acknowledged by Castaway. Simply sending an e-mail, having expected that our company has read it, is not adequate. Cancellations received will be acknowledged. If you have not received an acknowledgement, please contact Castaway's CS team.

### Cancellation and Change of Mind

If you have purchased Castaway software under subscription licence and you become dissatisfied with our software, or change your mind about an ongoing subscription, you may cancel your subscription and you will not be charged any further subscription fees.

Please note, while you will no longer be charged for the software under these conditions, we do not provide refunds for unused remaining portions of a subscription you have already agreed to purchase if you cancel your subscription or change your mind.

Also note, due to our strict privacy and security policies, once you cancel your subscription, you will lose access to Castaway software and any Castaway files you have created, and these will be permanently destroyed.

### Further information

If you require additional information in relation to this policy, or you have any suggestions for improvement to this policy, please contact [coo@castawayforecasting.com](mailto:coo@castawayforecasting.com).



Jo Buchanan  
COO  
1 September 2023

**CASTAWAY**

Revision history

VERSION	DATE	REVISION AUTHOR	SUMMARY OF CHANGES
1.0	1 MAR 2019	Jo BUCHANAN	Initial DRAFT
2.0	1 SEP 2023	Jo Buchanan	Updated v2.0

Distribution

Jo BUCHANAN	COO
Michael FORD	CEO
The Castaway Team (as determined)	All