

The Institute of Chartered Accountants in Australia
Application for special admission to
Membership (under By Law 12) (Reg R2, Clauses 201-212)



Please fill in your Institute ID number, if known (please use a BLACK pen)

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Please complete **ALL** the sections (1 – 10) below, and return the application with payment to the Institute's office (see page 6 for contact details). **Please print in BLOCK LETTERS.**

Section 1 – Personal details

Title Mr Mrs Miss Ms Dr

Given name/s (in full)

Family name Preferred name

Date of birth

Section 2 – Contact details

1. Personal contact details

Street address

State Postcode Country

PO Box address

State Postcode Country

Email (home)

Phone (home) Fax (home)

Mobile

2. Business contact details

Company name

Position in company

Street address

State Postcode Country

PO Box address

State Postcode Country

Email (work)

Phone (work) Fax (work)

3. Preferred contact details

Postal address: Home street address Home PO Box address
 Business street address Business PO Box address

Email address: Home Business



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Section 3 – Current member of another accounting body

Please indicate which accounting body you are a member of by marking the appropriate box below.

- Canadian Institute of Chartered Accountants
- Hong Kong Institute of Certified Public Accountants
(members who have completed the HKICPA Qualifications Programme and training under an authorised Employer/Supervisor)
- The Institute of Chartered Accountants in England & Wales
- The Institute of Chartered Accountants in Ireland
- New Zealand Institute of Chartered Accountants
(members of the College of Chartered Accountants)
- The Institute of Chartered Accountants of Scotland
- Certified Practising Accountants of Australia (CPAA)
- South African Institute of Chartered Accountants
- A legally constituted state authority in the USA
(the person having full CPA status and a licence to practice in that state)
- Institute of Chartered Accountants of India
(members having successfully completed the Institute's Ethics & Business Application module)
- The Malaysian Institute of Certified Public Accountants (MICPA)
(members who entered MICPA membership via completion of the Professional Program introduced prior to the July 2009 revised MICPA program, must complete an online ethics course prior to approval)

Membership no.

Date of admission

Section 4 – Tertiary education

Please list the details of your tertiary qualifications. **Certified copies of your tertiary qualifications – degree certificate(s) and transcript(s) must be attached.** (If additional space is required, please photocopy this page and attach to this application.)

Qualification 1:

Name of course

Name of University / Professional Association

Country of tertiary institution

Commenced Completed

Qualification 2:

Name of course

Name of University / Professional Association

Country of tertiary institution

Commenced Completed

Qualification 3:

Name of course

Name of University / Professional Association

Country of tertiary institution

Commenced Completed

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Section 5 – Professional experience

Please list details of your professional experience. (If additional space is required, please photocopy this page and attach to this application.)

Name of organisation

Street address

State Postcode Country

Position

Employment type Full time Part time

Duration to = Years Months

Firm type: Chartered CPA Public Accounting Commerce Other →

Name of organisation

Street address

State Postcode Country

Position

Employment type Full time Part time

Duration to = Years Months

Firm type: Chartered CPA Public Accounting Commerce Other →

Name of organisation

Street address

State Postcode Country

Position

Employment type Full time Part time

Duration to = Years Months

Firm type: Chartered CPA Public Accounting Commerce Other →

Name of organisation

Street address

State Postcode Country

Position

Employment type Full time Part time

Duration to = Years Months

Firm type: Chartered CPA Public Accounting Commerce Other →

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Section 6 – References

Please attach written references from each of the individuals described in category **A** or **B** below.

A. Overseas accounting bodies

Please attach written references from **each** of the individuals described below.

- Two (2)** references from **members of the Institute of Chartered Accountants in Australia** (CA or FCA), who are **not** related to you, and support your application for admission to membership, and who either:
 - have been a member of this Institute for at least **three (3)** years **OR**
 - are a member of this Institute and have been a member of **your overseas professional body** for at least **five (5)** years

AND

- At least **one (1)** reference from a person from the **country where your membership** was obtained, who knew you in a professional capacity (eg. former employer) and can testify to your professional experience.

B. Certified Practising Accountants of Australia (CPAA)

Two (2) references from **members of the Institute of Chartered Accountants in Australia** (the Institute) who are not related to you, who support your application for admission to membership, **and** who have been members of this Institute for at least **ten (10)** years.

Please note: written references must be original and dated within three (3) months of your application submission. The referees should indicate in their own words how they know you, how long they have known you, attest to your professional experience and state their support of your application. The reference should be provided on letterhead where possible.

Section 7 – Statutory registrations

Please indicate whether you hold any of the following registrations/authorities.

- Registered Company Auditor
- Registered Trustee in Bankruptcy
- Registered Tax Agent
- Registered BAS Agent
- Registered Company Liquidator
- Australian Financial Services Licensee (AFSL)
- SMSF Auditor.

Please note: If you have indicated that you hold any of the above Statutory Registrations, offer services to the public and/or you are currently/are becoming a partner/principal/director/sole practitioner in public practice, you are required to hold a Certificate of Public Practice (CPP). By law 34, Regulation R4 and R9 and guidance note N5 are the relevant sections of the Member’s Handbook that relate to CPPs. If you wish to apply for a CPP you must submit the relevant application form (with appropriate documentation) in addition to your application.

An interactive guide has been designed to assist members to determine whether they require a CPP. To utilise this tool and to access further information on CPP requirements, please visit charteredaccountants.com.au/cpp

Section 8 – Declaration

- Have you ever been convicted of a criminal offence or is there a charge pending? Yes No
- Have you ever been subject to disciplinary action by a statutory, professional or other body in respect of your professional capacity? Yes No
- Are you presently under any order of the court, are you a bankrupt, have you made an assignment for the benefit of your creditors or have you executed an authority under Part X of the *Bankruptcy Act 1966* within the last three (3) years? Yes No
- Are you subject to a notice not to manage a corporation as provided in section 206, Part 2D.6 of the *Corporations Act 2001*? Yes No

Note: If you have answered ‘**YES**’ to any of the above questions, please attach details.

Please indicate your acceptance of these terms by crossing the box beside each statement.

- I have read and agree to be bound by the Institute’s Supplemental Charter, By-laws and Regulations prescribing any ruling on the standards of practice and professional conduct, including the technical standards, as required by the Institute to be observed.
- I agree to abide by the lawful decisions of the Institute’s Board or any Regional or Local Council, Standing or other Committees or Officer of the Institute to whom the Board may, in accordance with the Supplemental Charter or the By-laws, delegate its functions or powers.
- I agree to produce such further evidence and information in relation to this application as may be required by the Institute and attest that the information supplied is true and correct.

In consideration of the Institute of Chartered Accountants in Australia’s (the Institute) evaluation of my suitability for membership, I understand and agree that confirmation of my responses will be sought. These checks may include, but are not limited to, criminal history and verification of my qualifications and professional membership(s). I hereby authorise the Institute and its authorised nominees to collect, use, disclose and store personal information about me from third parties, for the purpose of verifying my experience and qualifications.

Additionally, I allow third parties holding personal information about me to release such information to the Institute and its authorised nominees.

Applicant’s signature

Date

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Section 9 – Payment details

Fees:

1. **Application fee**
(non refundable) AU\$

2. **Online Ethics Course fee –**
if applicable* (non refundable) AU\$

3. **Subscription fee** AU\$

Total payable AU\$

Payable by:

Cash Cheque/Bank Draft
(payable to the Institute of Chartered Accountants in Australia)

Amex Visa MasterCard Diners Club

Card number

Expiry date

Card holder name

Card holder signature

Members' Handbook

The Members' Handbook is offered online as a free member service and is updated every eight weeks – available at www.charteredaccountants.com.au/handbook.

A free Handbook CD-rom is produced in December each year, targeted at members who are unable to access the internet version of the Members' Handbook and/or need to access the Members' Handbook from their hard drive. If a CD is required, you can update your Handbook delivery method online – simply log on to the website and update your Survey preferences.

The network version of the Handbook CD-rom allows multiple users and can be purchased online at charteredaccountants.com.au/handbook.

All applicants are required to pay both the membership application fee, as well as the relevant subscription fee.

Note: Online Ethics Course fees are also applicable for MICPA members as per point 2 below.

1. Application fee

You must pay the **AU\$521** application fee when submitting the application form.

2. Online ethics course fees*

MICPA members who completed the professional program introduced prior to the July 2009 revised MICPA program, **must** pay the **AU\$200** fee for the online ethics course when submitting the application form.

3. Membership subscription fees

The Institute membership subscription is based on a financial year (July to June). The relevant subscription fee (a pro-rata fee applies if the application is made in any month other than July) will be payable before the application approval is finalised (see table below).

| Subscription fees (2010/11) | | Jul 10 | Aug 10 | Sep 10 | Oct 10 | Nov 10 | Dec 10 | Jan 11 | Feb 11 | Mar 11 | Apr 11 | May 11 | Jun 11 |
|-----------------------------|----------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Australian resident | AU\$ (incl. GST) | 790.90 | 724.99 | 659.08 | 593.18 | 527.27 | 461.36 | 395.45 | 329.54 | 263.63 | 197.73 | 131.82 | 65.91 |
| Overseas resident | AU\$ | 575.20 | 527.27 | 479.33 | 431.40 | 383.47 | 335.53 | 287.60 | 239.67 | 191.73 | 143.80 | 95.87 | 47.93 |

Section 10 – Documentary requirements / checklist

- Completed **all** the sections (1 – 9)
- Declaration completed and signed
- Have read and understood Regulations 201 – 212 and regulations relating to Certificates of Public Practice and Training & Development
- Payment** authorised/attached.

Documentation (applicable to **all** applicants)

- Certified** (original) copy of **tertiary qualifications** eg. degree certificates and transcripts (if applicable)
- Full **résumé / CV**
- Letter of Good Standing**
An original letter must be obtained from your accounting body stating that you are a current financial member in good standing (dated within three (3) months of application received date).

CPAA members ONLY:

- List of training and development activity (including number of hours) in past three (3) years
- Personal statement and third party verification of activities contributing to the professional community, member body or the Institute.

ICA India ONLY:

- The original Letter of Good Standing** – submitted with your enrolment application remains valid for 6 months from the commencement date of your first EBA module. Therefore you will only need to provide a new 'Letter of Good Standing' if you apply for membership after this period.

US CPA members only:

- Documentation** demonstrating satisfactory knowledge of **Australian Corporate and Taxation Laws** (official transcript for bridging studies OR details of relevant Australian experience).

Note: although the Institute no longer requires applicants from most GAA bodies to demonstrate knowledge of Australian Corporate and Taxation Laws for the purpose of becoming a member, it is important to note that this remains a statutory requirement for some specialist registrations, or if you are a principal in a public practice and have not had more than three (3) years work experience in Australia.

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Section 11 – Submitting your application form

Application forms / Supporting documents

Please submit your completed application **with payment** to:

| | |
|------------------|--|
| Mail | Customer Transactions Team The Institute of Chartered Accountants in Australia GPO Box 9985, Sydney 2001 Australia |
| Fax | +61 2 9262 1298 |
| In person | |
| ACT | L10, 60 Marcus Clarke Street, Canberra |
| NSW | 33 Erskine Street, Sydney |
| Qld | L32, Central Plaza One, 345 Queen Street, Brisbane |
| SA | L11, 1 King William Street, Adelaide |
| Vic | L3, 600 Bourke Street, Melbourne |
| WA | Ground Floor, BGC Building, 28 The Esplanade, Perth |

For further enquiries or additional information please contact the Chartered Accountants Service Centre on:

| | |
|--------------|--|
| Web | charteredaccountants.com.au |
| Phone | |
| Australia | 1300 137 322 |
| Overseas | +61 2 9290 5660 |
| Email | service@charteredaccountants.com.au |
| Fax | +61 2 9262 1298 |

Privacy statement

The Institute of Chartered Accountants in Australia respects the privacy of individuals and acknowledges that the information you provide on this form is 'personal information' as defined by the Commonwealth *Privacy Act*. The information is being collected for the purpose of processing your application. The provision of this information is voluntary, but if it is not provided the Institute may be unable to process your application. If your application is successful, the information will also be used for the purposes listed in the Institute's privacy policy – a copy of which is at charteredaccountants.com.au/A116990340

ABN 50 084 642 571 The Institute of Chartered Accountants in Australia Incorporated in Australia Members' Liability Limited. Templates/Forms_CT-12 (8/10)