

# Application by a Chartered Accountants Program Graduate for Membership

(under By Law 10a) (Reg R2, Clauses 101-110)



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

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Please complete **ALL** the sections (1 – 9) below, and return the application with payment to the Institute’s office (see page 5 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



# Application by a Chartered Accountants Program Graduate for Membership

## Section 3 – Late application

Did you finish the Chartered Accountants Program more than one (1) year ago?  Yes  No

If you answered 'yes', you must provide details of Training and Development (T&D) that you have undertaken since completing the Chartered Accountants Program\*. You must use the 'Record Sheet' that is provided under **Training and Events/Training & Development requirements** on the Institute website [charteredaccountants.com.au](http://charteredaccountants.com.au) where examples of activities that qualify for T&D are given. Attach the completed 'Record Sheet' to this application.

## Section 4 – Service and employment details

I confirm that I have completed the required approved experience mentored by a Chartered Accountant in public practice or in an accredited organisation/s.

Please cross the appropriate box:

At least three (3) years full time (or effective full time equivalent) experience mentored by a Chartered Accountant in public practice or in an organisation accredited by the Institute

**OR**

A total of five (5) years experience, with three (3) years general accounting experience completed prior to enrolling in the Chartered Accountants Program\* (as per Reg 6.2(b)) and at least two (2) years full-time (or effective full-time equivalent) experience mentored by a Chartered Accountant in public practice or in an organisation accredited by the Institute.

### List details of this employment:

\* Please check your service details held by the Institute online at [charteredaccountants.com.au/dashboard](http://charteredaccountants.com.au/dashboard) and where details differ, attach a letter from the firm(s) indicating start and/or end date. (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  DD.MM.YYYY to  DD.MM.YYYY =  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  DD.MM.YYYY to  DD.MM.YYYY =  Years  Months

Firm type:  Chartered  CPA  Public Accounting  Commerce  Other →



**Section 6 – Statutory registrations**

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

- Licenced Municipal Auditor (or its equivalent)
- Registered Company Auditor
- Registered Trustee in Bankruptcy
- Registered Tax Agent
- Registered Company Liquidator
- Financial Planning Specialist
- 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](http://charteredaccountants.com.au/cpp)

**Section 7 – Declaration**

- a) Have you ever been convicted of a criminal offence or is there a charge pending?  Yes  No
- b) Have you ever been subject to disciplinary action by a statutory, professional or other body in respect of your professional capacity?  Yes  No
- c) 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
- d) 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

## Application by a Chartered Accountants Program Graduate for Membership

### Section 8 – Payment details

#### Fees payable:

1. Application fee AU\$

2. Membership subscription fees AU\$

Total payable AU\$

I authorise the Institute to deduct the appropriate application fee from my credit card (see details on payment below).

#### Handbook preferences

I would prefer to:

Access the Members' Handbook online via the Institute website [charteredaccountants.com.au](http://charteredaccountants.com.au)

OR

Receive the six-monthly CD-Rom version of the Member's Handbook update.

#### Payable by:

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

Amex  Visa  MasterCard  Diners

Card number

Expiry date

CVV no.\*   
(last 3 digits)

\*CVV number is the verification code located on the back of your credit card.

Card holder name

Card holder signature

You must pay the relevant application fee, as well as the relevant subscription fee. **Please note**, where reference is made to the 'Chartered Accountants Program', it is also relevant to the 'Professional Year Programme'. \*

#### 1. Application fee (GST free)

The application fee is dependant on when your application is received:

**\$310** – If you apply **within** three (3) months after completing the Chartered Accountants Program\* and your service requirement

**\$515** – If you apply **more** than three (3) months after completing the Chartered Accountants Program\* and your service requirements.

#### 2. Membership subscription fees

The Institute membership subscription is based on a financial year (July to June). You must pay 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 (2009/10)	Jul 09	Aug 09	Sep 09	Oct 09	Nov 09	Dec 09	Jan 10	Feb 10	Mar 10	Apr 10	May 10	Jun 10
<b>Australian resident</b> (incl. GST)	781.00	715.92	650.83	585.75	520.67	455.58	390.50	325.42	260.33	195.25	130.17	65.08
<b>Overseas resident</b>	568.00	520.67	473.33	426.00	378.67	331.33	284.00	236.67	189.33	142.00	94.67	47.33

### Section 9 – Checklist

- Completed **all** the sections (1 – 8)
- Completed **Chartered Accountants Program\***
- Service requirements** completed
- Original references** dated within three (3) months of application

- T&D record sheet** attached (if applicable)
- Payment** authorised/attached.
- Completed **Mentor final report form** (see page 6)

**Note:** Only applicable to candidates who have done the 'Practical Experience Program' or participated in the 'in-house recognised program'.

### Section 10 – Submitting your application form

#### Application forms / Supporting documents

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

<b>Mail</b>	Customer Transactions Team The Institute of Chartered Accountants in Australia GPO Box 9985, Sydney 2001 Australia
<b>Fax</b>	+61 2 9262 1298
<b>Email</b>	<a href="mailto:service@charteredaccountants.com.au">service@charteredaccountants.com.au</a>
<b>In person</b>	
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:

<b>Web</b>	<a href="http://charteredaccountants.com.au">charteredaccountants.com.au</a>
<b>Phone</b>	
Australia	1300 137 322
Overseas	+61 2 9290 5660
<b>Email</b>	<a href="mailto:service@charteredaccountants.com.au">service@charteredaccountants.com.au</a>
<b>Fax</b>	+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](http://charteredaccountants.com.au/A116990340)

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# Mentor's final report

Please fill in the Candidate ID number, if known (please use a BLACK pen)

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Please complete sections (1 – 3) below, and return the form to the Institute's office (see section 4 for contact details).

**Please print in BLOCK LETTERS. Note:** Mentors and candidates should retain a copy of this signed final report for their records.

## Section 1 – Candidate / Mentor details

Mentor's name  Mentor member no.

Candidate's name

Company name  Date of final sign-off meeting ..

Start and End date for the 3-year Practical Experience Component of Chartered Accountant Pathway

Start date .. End date ..

## Section 2 – Candidate competency levels

I **verify** this candidate has developed 100% competencies in one of the following areas or across two or more of the following areas (enter the % coverage in the areas that apply):

Areas of accounting and finance	% of competencies demonstrated
Financial accounting and reporting	
Management accounting and control	
Taxation	
Business and commercial law	
Audit and assurance	
Finance and financial management	

I **verify** this candidate has also developed the required level of competence in the following:

Competencies	Yes	No
Organisational and business areas	<input type="checkbox"/>	<input type="checkbox"/>
Information technology	<input type="checkbox"/>	<input type="checkbox"/>
Professional skillw	<input type="checkbox"/>	<input type="checkbox"/>
Professional values, ethics and attitudes	<input type="checkbox"/>	<input type="checkbox"/>

### Privacy statement

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## Section 3 – Declaration

In my opinion the candidate fulfils the Practical Experience requirements for membership of the Institute of Chartered Accountants in Australia. This endorsement applies to the Practical Experience Component of the Chartered Accountant Pathway and is not to be used as a general reference.

**I declare that the information I have given in this form is complete, correct and up-to-date.**

Mentor's name

Signature

Date ..

## Section 4 – Submitting the final report form

Please return the **completed** final report form to:

<b>Mail</b>	Institute Service Centre The Institute of Chartered Accountants in Australia GPO Box 9985, Sydney 2001 Australia
<b>Fax</b>	+61 2 9262 4841
<b>Email</b>	<a href="mailto:service@charteredaccountants.com.au">service@charteredaccountants.com.au</a>

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

<b>Web</b>	<a href="http://charteredaccountants.com.au">charteredaccountants.com.au</a>
<b>Phone</b>	1300 137 322 (Australia wide)
<b>Email</b>	<a href="mailto:service@charteredaccountants.com.au">service@charteredaccountants.com.au</a>