



A. YOUR PERSONAL DETAILS

Mr Mrs Miss Ms Other (please state) Gender Male Female

Given name Middle name Family Name

Preferred name Previous name (if changed)

Date of birth (mandatory) DD / MM / YYYY

Current position title

Company name

Preferred mailing address Residential or Business

Address

Suburb/Town/City State Postcode

Contact phone numbers: Mobile Business Home

Email address (mandatory)

Your CPA Australia membership and Public Practice Certificate (PPC) details

Table with 4 columns: Membership ID, Current member level (ASA, CPA, FCPA), Do you hold a PPC? (Yes, No), Membership/PPC paid to (DD / MM / YYYY)

Note: Please provide a copy of your membership and PPC (if applicable) renewal tax invoice receipt.

B. MORE INFORMATION ABOUT YOU

Have you ceased to be a member of a professional body due to disciplinary action? No Yes

Have you ever been refused admission to the IPA or any other professional body? No Yes

Have you ever had any criminal convictions within or outside Australia? No Yes

Have you been the subject of an unfavourable decision by a professional body and/or a Regulator? No Yes

Have you ever been declared bankrupt or insolvent? No Yes

If you answered Yes to any question(s) above, please provide details on a separate page with any related official documentation.

C. PROFESSIONAL SERVICES

Do you provide accounting or/and related services to the public for a fee as a Director, Partner, Shareholder, Principal, or Sole Trader? No Yes

Do you audit Self-Managed Super Funds (SMSFs)? No Yes

Is your income from providing services more than \$18,200 (current threshold)? No Yes

If you are in public practice, do you provide bookkeeping/BAS agent services only? No Yes

Note: If you answered Yes to any questions in this section, you may need to apply for a Public BAS Practitioner Certificate or a Professional Practice Certificate (PPC) with your IPA membership under the IPA By-laws. We will contact you if you are required to hold a practice certificate. If you currently hold a PPC with CPA Australia, please refer to Section E.

D. STATUTORY REGISTRATIONS

Australian Securities and Investments Commission (ASIC) registrations	Tax Practitioners Board (TPB) registrations
<input type="checkbox"/> Australian Financial Services Authorised Representative No. _____	<input type="checkbox"/> Individual BAS agent No. _____
<input type="checkbox"/> Registered Company Auditor No. _____	<input type="checkbox"/> Individual tax (financial) adviser No. _____
<input type="checkbox"/> Official Liquidator No. _____	<input type="checkbox"/> Individual tax agent No. _____
<input type="checkbox"/> Registered Liquidator No. _____	
<input type="checkbox"/> SMSF Auditor No. _____	
<input type="checkbox"/> Credit Representative No. _____	

E. PROFESSIONAL PRACTICE CERTIFICATE (PPC)

Do you currently hold a PPC with CPA Australia? Yes No

If you answered No, skip the rest of the questions in this section and go to Section F on the next page.

Your business entity _____

Business name _____

ABN _____ ACN _____

Your interest in the business:

Sole trader Partner Director Shareholder Principal Other (provide details) _____

Business contact details (mandatory):

Principal place of business _____

Suburb/Town/City _____ State _____ Postcode _____

Services you provide to the public: _____

Please provide details of your current professional indemnity insurance:

Insurer _____ Cover amount \$ _____ **any one claim**

Cover end date DD / MM / YYYY _____

Note: Did you know that the IPA has a [Find an Accountant](#) page on our website? If you wish to promote your business on the IPA website, once your membership and PPC are finalised, log into your IPA account and enter your business details under the 'Find an Accountant' listing.

F. DECLARATION

I declare that:

- I have read the IPA's membership price list and understand that I will be charged a membership fee and a PPC fee, if applicable. Note: Your first year membership and PPC fee are pro rata according to the month in which you join, then annually thereafter due on 1 July. Refer to the link in Section G on the next page.
- I understand that by providing my credit/debit card details or cheque payment that I am confirming I have sufficient funds to pay for all fees relating to this application. I also understand that my membership and PPC (if applicable) will not become active until the payment has been received by the IPA and I will receive a tax invoice by email upon payment.
- I have read the [IPA's Privacy Statement](#) and consent to my personal information being collected, used and disclosed for the purposes outlined.
- I understand that my eligibility for membership and any offer of admission to membership at a particular level will be based on the information contained within this application and supporting document.
- I understand that the IPA has an [investigations and disciplinary process](#) to accept written complaints against IPA members. As a condition of membership all IPA members are subject to this investigation and disciplinary process for alleged breaches of the IPA Constitution, By-laws, Pronouncements and professional and ethical standards.
- If admitted to membership:
 - a I agree to abide by the [IPA Constitution, Regulations, Pronouncements and By-Laws](#) ;
 - b I agree to undertake and keep a record of my continuing professional development activities (**80 hours biennial**);
 - c I acknowledge that I am not permitted to act as a principal in public practice or hold myself out as being a principal in public practice;
 - d or undertake any public accounting services in my own right unless I meet the PPC requirements of IPA; and
 - e I agree to advise the IPA should I become bankrupt, be charged with any criminal offence or be the subject of an adverse finding by any professional or regulatory body.
- If my PPC is approved with membership, I also agree to abide by all standards, Guidance Statements and other authoritative interpretations issued by the Auditing & Assurance Standards Board of Australia, the Australian Accounting Standards Board and the Accounting Professional and Ethical Standards Board, including the requirements to:
 - a Maintain professional indemnity insurance that complies with IPA requirements;
 - b Complete the IPA's Professional Practice Program within 6 months of issue of my PPC, if not exempted; and
 - c Undergo an IPA professional practice quality assurance review when required.

I certify that the information provided on this application form is true and correct.

Signature _____ Date: DD / MM / YYYY

G. PAYMENT DETAILS

With this fast-track application, we will waive your application fee (\$150.00) and **PSC** fee (\$88.00)*

Your application must include payment of:

- **Membership fee**; AND
- **PPC fee** if you hold a PPC with CPA Australia

Payment authority

I have enclosed a cheque/money order payable to "Institute of Public Accountants"

OFFICE USE ONLY

Membership fee \$ _____

PPC fee* \$ _____

Total amount due \$ _____

Campaign code # _____
(if applicable)

OR

Please charge my AMEX MasterCard Visa

Card number

Expiry date /

Cardholder name _____

Signature _____ Date / /

Upon payment, you will receive a Tax Invoice by email.

*PPC fee and PSC fee are only applicable to those who currently hold a PPC with CPA Australia.

CHECKLIST

Have you completed and attached the following?

- 1 Supplementary details regarding information about you (if required, Section B)
- 2 Copy of current renewal receipt for your membership with CPA Australia attached
- 3 Copy of current renewal receipt for your PPC with CPA Australia attached, if applicable
- 4 Authorised your credit card payment for your membership fee and PPC fee (if applicable) under Section G or provided a cheque made payable to The Institute of Public Accountants?
- 5 Signed Section F declaration?

HOW TO SUBMIT YOUR FORM

Please scan and email your completed form with attachment to:

membership@publicaccountants.org.au

Note: This offer is valid til 31 December 2017.

For any questions, please contact us on 1800 625 625 (9am – 5pm (AEST), Monday to Friday).