



A Your personal details

Previous member ID _____ **Do you wish to reinstate or rejoin¹?** Reinstated Rejoin

Mr Mrs Miss Ms Other, please state _____ Gender Male Female

Given name _____ Middle name _____ Family name _____

Preferred name _____ Previous name (if changed) _____

Name to appear on IPA membership certificate

Please indicate how you would like your name to appear on your membership certificate (e.g. John David Smith).

Date of Birth ____ / ____ / ____ (mandatory, dd/mm/yyyy)

Contact details Preferred mailing address (Please indicate if this address is Residential or Business)

Line 1 _____

Line 2 _____

Suburb/Town/City _____ State _____ Postcode _____

Contact phone numbers: Mobile _____ Business _____ Home _____

Email address (mandatory) _____

¹**Reinstated:** To return to the same or equivalent level of your previous membership by paying the back fees (payment of your membership fees from the day you resigned or your membership lapsed to the end of the last financial year) and current fee (payment of your membership fee for this financial year). You will keep your original join date.

Rejoin: To reapply as a new member. Our current admission policies will be applied. Once approved, you will get a new join date.

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

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

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C Membership of International Federation of Accountants (IFAC) Member level bodies

| Professional body | Membership ID | Country | Admission date | Current member level | Membership paid to |
|--------------------|---------------|------------------|-------------------|----------------------|--------------------|
| <i>e.g: CA ANZ</i> | <i>12345</i> | <i>Australia</i> | <i>28/01/2009</i> | <i>CA</i> | <i>30/06/2019</i> |
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Note: Please check if your membership body is one of the IFAC Member level bodies: www.ifac.org/about-ifac/membership/member-organizations-and-country-profiles. If this is your re-admission basis, please provide documentary evidence of your current membership with this application (e.g. membership certificate and current membership renewal tax invoice receipt, or a letter of good standing).

D Qualifications

Please include details of fully completed relevant qualifications.

| Qualification | Major | Institution | Location & country | Date completed* |
|----------------------------------|-------------------|--------------------------|--------------------------|-------------------|
| <i>e.g: Bachelor of Commerce</i> | <i>Accounting</i> | <i>University of NSW</i> | <i>Sydney, Australia</i> | <i>22/10/2011</i> |
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*The date when all requirements were completed and you became eligible to receive an award

Note: Please refer to FAQ 1 for supporting document requirements.

E Professional work experience in accountancy and related fields

| From | To | Position title | FT, PT or Casual | Employer name |
|------------------------|--|----------------|------------------|---------------------------|
| <i>e.g. 08/06/2012</i> | <i>Current</i> | <i>Partner</i> | <i>FT</i> | <i>Accounting for you</i> |
| Responsibilities | <i>Tax returns for individual, partnership, or company. Supervising two Accountants.</i> | | | |
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| Responsibilities | | | | |
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| Responsibilities | | | | |
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| Responsibilities | | | | |

F Statutory registrations

| Australian Securities and Investments Commission (ASIC) registrations | Tax Practitioners Board (TPB) registrations |
|--|--|
| <input type="radio"/> Australian Financial Services Licensee (AFSL) No. _____ <input type="radio"/> Limited AFSL No. _____ *If the licence is not under your name, are you the Responsible Manager? <input type="radio"/> Yes <input type="radio"/> No (See Note below) | <input type="radio"/> Individual BAS agent No. _____ |
| <input type="radio"/> Australian Financial Services Authorised Representative No. _____ (Licensee name: _____) Licence No. _____, <input type="checkbox"/> Limited AFSL or <input type="checkbox"/> AFSL) | <input type="radio"/> Individual tax (financial) adviser No. _____ |
| <input type="radio"/> Australian Financial Adviser No. _____ (Licensee name: _____) Licence No. _____, <input type="checkbox"/> Limited AFSL or <input type="checkbox"/> AFSL) | <input type="radio"/> Individual tax agent No. _____ |
| <input type="radio"/> Registered Company Auditor No. _____ | |
| <input type="radio"/> Official Liquidator No. _____ | |
| <input type="radio"/> Registered Liquidator No. _____ | |
| <input type="radio"/> SMSF Auditor No. _____ | |
| <input type="radio"/> Credit Licensee No. _____ | |
| <input type="radio"/> Credit Representative No. _____ (Licensee Name: _____ Licence No. _____) | |

Note: You are not required to provide evidence. We will verify your registration(s) on the ASIC and/or TPB website(s). However, for an Australian Financial Services Licensee (Both AFSL and Limited AFSL), if the licence is under the entity's name and you are the Responsible Manager, please provide documentary evidence.

G Professional services

If you offer or plan to offer professional accounting and related services to the public for a fee, you may need to apply for a practicing certificate with your IPA membership. This includes you being a principal, director, partner, shareholder or owner of a business, billing under your own ABN, or acting in a statutory capacity such as an SMSF auditor. If you are a registered BAS agent with the TPB and if you provide bookkeeping and BAS agent services only, you are required to apply for a Public BAS Practitioner Certificate. If you provide accounting and related services and if your gross annual income exceeds or is expected to exceed the ATO tax-free-threshold, you are required to apply for a Professional Practice Certificate. Please contact your local IPA office on 1800 625 625 for further information. Please also refer to FAQ 2.

Do you provide or intend to provide professional accounting or related services to the public? Yes No

If you answered Yes to the above, please complete the below:

Business name: _____ ABN: _____

Your interest in the business: Sole trader Partner Company Director Shareholder Employee

If 'yes' please state nature of the services provided:

Do you advertise or/and provide BAS agent services for a fee? Yes No

Do you advertise or/and provide tax advice in relation to financial planning for a fee? Yes No

Do you advertise or/and provide tax agent services for a fee? Yes No

Do you audit self-managed superannuation funds (SMSFs) for a fee? Yes No

Do you provide financial planning services, investment advice or SMSF advice for a fee? Yes No

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

Note: If you answered Yes to any of the above questions, we may need further information before finalising our assessment.

H Declaration

I declare that:

- I have read the IPA's membership price list and understand that I will be charged an application fee, a membership fee and membership back fees for reinstatement. If I rejoin, I understand that my first year membership fee is pro rata according to the month in which I rejoin, then annually thereafter due on 1 July - refer to the link in Section J on the next page.
- I understand that by providing the credit/debit card details or cheque details, I am confirming that I have sufficient funds and have authorised for IPA to process all the fees relevant to this application as prescribed in Section J. I also understand that my membership will not become active until the payment has been received by the IPA and I will receive a tax invoice/receipt via email upon successful payment.
- I have read the IPA's Privacy Statement² and consent to my personal information being collected, used and disclosed for the purposes outlined.
- I understand that my eligibility for membership will be based on the information and supporting documents that I have supplied for this application.
- I understand that I may be asked to produce documentary evidence to substantiate my eligibility and should I be unable to provide required evidence within 14 days, I will forfeit my membership and all monies paid to the IPA.
- I understand that the IPA has an investigations and disciplinary process³ 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 re-admitted to membership,
 - a. I agree to abide by the IPA Constitution, By-laws, Pronouncements⁴ and all Standards and Guidance Statements issued by the Auditing & Assurance Standards Board of Australia, the Australian Accounting Standards Board and the Accounting Professional and Ethical Standards Board;
 - b. I agree to undertake and keep a record of my continuing professional development activities, meeting the requirements of Pronouncement 7;
 - c. 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; and
 - d. 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, or undertake any public accounting services in my own right unless I meet the PPC requirements of IPA.

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

Full name _____

Signature _____ **Date** ____ / ____ / ____

²For full Privacy Policy and Collection Notice, go to www.publicaccountants.org.au/portal/privacy-and-policy.

³For the IPA Complaint Investigation and Member Disciplinary Action information, go to www.publicaccountants.org.au/about-us/complaint-investigation-member-disciplinary-action.

⁴For the IPA Constitution, By-laws and Pronouncements, go to www.publicaccountants.org.au/about-us/ipa-rules-and-standards. Failure to comply with these regulations may result in disciplinary action.

I IPA Program

The IPA Program is conducted in association with the Deakin University. This is the IPA's key pathway to professional advancement as well as a great opportunity to obtain a Master of Business Administration (MBA) from Deakin University. Please refer to FAQ 6 or visit www.publicaccountants.org.au/education/ipaprogram. If you would like more information, please tick here. Yes

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J

Payment details

Your application must include payment of

- A non-refundable application fee of \$160; **AND**
- Membership fees payable (see www.publicaccountants.org.au/become-a-member/how-to-apply/fees); **AND**
- For reinstatement, membership back fees (for total amount payable, please contact your local IPA office on 1800 625 625).

Payment authority

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

OR

Please charge my AMEX MasterCard Visa

Card number _____ Expiry date ____ / ____

Cardholder name _____

Signature _____ **Date** ____ / ____ / ____

Upon payment, you will receive a Tax Invoice email.

| | |
|----------------------------------|-----------------|
| OFFICE USE ONLY | |
| Application fee (non-refundable) | \$160.00 |
| Membership fee | \$ _____ |
| Membership back fees | \$ _____ |
| Total amount due | \$ _____ |
| Campaign code # (if applicable) | _____ |

All fees are GST inclusive

Any questions? Please contact us on 1800 625 625 (9 am – 5 pm (AEST), Monday to Friday).

How to submit your form:

Please scan and email your completed form with supporting documents to your local IPA office below.

IPA offices contact details

| | |
|--|---|
| <p>New South Wales & Australian Capital Territory Street address Level 12, 6 O’Connell Street, Sydney NSW 2000 Postal address Locked Bag A6090, Sydney South NSW 1235 t (02) 8262 6000 f (02) 9251 5201 e nswdivn@publicaccountants.org.au</p> | <p>Queensland Street address Level 11, 300 Queen Street, Brisbane QLD 4000 Postal address GPO Box 2578, Brisbane QLD 4001 t (07) 3034 0900 f (07) 3229 8586 e glldivn@publicaccountants.org.au</p> |
| <p>South Australia & Northern Territory Street address Level 2, 422 King William Street, Adelaide Postal address PO Box 6368, Halifax Street SA 5000 t (08) 8227 2255 f (08) 8227 1211 e sadivn@publicaccountants.org.au</p> | <p>Tasmania Street address Level 1, 116 Bathurst Street Hobart TAS 7000 Postal address GPO Box 244, Hobart TAS 7001 t (03) 6231 2097 e tasdivn@publicaccountants.org.au</p> |
| <p>Victoria Street address Level 6, 555 Lonsdale Street, Melbourne VIC 3000 Postal address GPO Box 1637, Melbourne VIC 3001 t (03) 8665 3150 f (03) 8665 3151 e vicdivn@publicaccountants.org.au</p> | <p>Western Australia Street address Level 4, 1008 Hay Street, Perth WA 6000 Postal address PO Box 7309, Cloisters Square WA 6850 t (08) 9474 1775 f (08) 9474 2911 e wadivn@publicaccountants.org.au</p> |

Frequently asked questions

1. If I want to rejoin, what evidence do I need to provide?

If you hold an Australian eligible qualification with an accounting major, or if you are a current member of an International Federation of Accountants (IFAC) Member level body, or if you hold a statutory registration with the Tax Practitioners Board (TPB) or/and Australian Securities & Investments Commission (ASIC), no evidence is required at admission as long as you have provided information in your application. However, if the statutory registration is the ASIC Australian Financial Services Licensee (both AFSL and Limited AFSL) and if it is under your entity’s name, you are required to provide documentary evidence showing that you are the Responsible Manager.

Members admitted under this pathway may be subject to audit as per the declaration made in section **(H)**.
If you hold an overseas qualification or Australian qualification with a non-accounting major, you need to provide copies of award certificates and transcripts for assessment of eligibility for membership. Documents that are not in English must be submitted with a certified accredited English translation.
Please also include any official Australian assessment of an overseas qualification, if you have any.
Additional evidence may be required depending on your circumstances.

2. When is a practicing certificate required?

If you offer or plan to offer professional accounting and related services to the public for a fee, you may need to apply for a practicing certificate with your IPA membership. This includes you being a principal, director, partner, shareholder or owner of a business, billing under your own ABN, or acting in a statutory capacity such as an SMSF Auditor. Accounting and related services include but not limited to financial accounting services, taxation, auditing, BAS services, bookkeeping, financial and investment advice, insolvency and reconstructions, business or management consulting, superannuation advice, insurance and information technology.

If you are a registered BAS agent with the TPB and if you provide bookkeeping and BAS agent services only, you are required to apply for a Public BAS Practitioner Certificate.

If you provide accounting and related services and if your gross annual income exceeds or is expected to exceed the ATO tax-free-threshold, you are required to apply for a Professional Practice Certificate under the IPA By-laws. Please contact your local IPA office on 1800 625 625 for further information.

3. What fees will apply?

For both reinstatement and rejoin applications, you are required to pay a non-refundable application fee of \$160.00. If you rejoin, in addition to the application fee, you also need to pay a membership fee. The IPA membership subscription year is a financial year. Members readmitted during the year will have their membership fees calculated on a pro-rata basis. Please see www.publicaccountants.org.au/become-a-member/how-to-apply/fees.

For reinstatement applications, you will need to pay application fee, membership back fees and current financial year's full fee. For any questions, please contact your local IPA office on 1800 625 625.

4. How do I advance to Member (MIPA) membership?

You must undertake and complete the IPA Program Stage 1 and the Mentored Experience Program (MEP). Please refer to FAQ 6 and 7 for details.

5. How do I advance to Fellow (FIPA) membership?

You must have been a Member (MIPA) level member for at least 7 consecutive years, and have had at least 10 years relevant work experience (the last 5 years of which must be at a senior level).

6. What is the IPA program and why do I have to undertake the program?

The IPA Program is exclusively to IPA members, delivered by Deakin University. The full IPA Program is made up of two stages, which when completed, will award you a Master of Business Administration (MBA) from Deakin University. The first six units of the IPA Program (Stage 1, Pathway Program) have been designed to accommodate the needs of the Associate members. Following the successful completion of the first stage of the IPA Program, Associate (AIPA) members then advance to the Member (MIPA) level, if you have also completed the MEP. You are then welcome to commence the Deakin MBA as the second stage of the IPA Program. For more information, go to www.publicaccountants.org.au/education/ipa-program/program-structure.

7. What is the Mentored Experience Program (MEP)?

The MEP is designed to provide a structured approach to your workplace learning and ongoing professional development. It is entirely a work-experience based program guided by a mentor and is a support mechanism for your career development. The purpose of the program is for you to work with a more experienced accountant who can guide and assist you in the early stages of your career. In the program you will complete suitable work experience and provide documentary evidence relating to a number of agreed areas of work activity under the supervision of a mentor. The MEP is an important condition for advancement to the Member (MIPA) level. For more information, go to www.publicaccountants.org.au/education/mentored-experienceprogram.