



**Note: Please complete ALL sections in this application.**

**A**

## Your personal and business details

☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other, please state \_\_\_\_\_ Gender: ☐ Male ☐ Female

Given name \_\_\_\_\_ Middle name \_\_\_\_\_ Family name \_\_\_\_\_

Preferred name \_\_\_\_\_ Previous name (if changed) \_\_\_\_\_

**Your name for the membership certificate** (e.g. John David Smith)

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Date of birth \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (mandatory, dd/mm/yyyy)

### Your business entity

Registered business name \_\_\_\_\_

ABN \_\_\_\_\_ ACN \_\_\_\_\_

Website \_\_\_\_\_

Your interest in the business:

☐ Sole trader ☐ Partner ☐ Principal ☐ Director ☐ Shareholder ☐ Other: \_\_\_\_\_

→ **Commencement date** \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (compulsory)

Number of staff: ☐ 1 ☐ 2-5 ☐ 6-10 ☐ 11-20 ☐ 21-30 ☐ 31-50 ☐ 51+

Number of clients: ☐ 1-50 ☐ 51-100 ☐ 101-200 ☐ 201-300 ☐ 301-500 ☐ 501+

### Contact details

Home address \_\_\_\_\_ Principal place of business \_\_\_\_\_

Postal address \_\_\_\_\_ Postal address \_\_\_\_\_

Suburb/Town/City \_\_\_\_\_ Suburb/Town/City \_\_\_\_\_

State/Territory \_\_\_\_\_ Postcode \_\_\_\_\_ State/Territory \_\_\_\_\_ Postcode \_\_\_\_\_

Home phone \_\_\_\_\_ Business phone \_\_\_\_\_

Mobile \_\_\_\_\_ Business fax \_\_\_\_\_

Home email \_\_\_\_\_ Business email \_\_\_\_\_

Preferred mailing address:

☐ Home address ☐ Home postal address ☐ Principal place of business ☐ Business postal address

Preferred email: ☐ Home ☐ Business

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## B More information about you

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

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

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

Have you been the subject of an unfavourable decision by a professional or regulatory body? ☐ Yes ☐ No

Have you ever been declared bankrupt or insolvent? ☐ Yes ☐ No

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

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

Professional body	Membership ID	Country	Admission date	Current member level	Membership paid to
e.g: CA ANZ	12345	Australia	28/01/2009	CA	30/06/2020

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](http://www.ifac.org/about-ifac/membership/member-organizations-and-country-profiles). Note that ATMA, NTAA, Tax Institute, AAT (Australia), ICB and Australian Bookkeepers Association are not IFAC bodies.

If this is your 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 Tax Practitioners Board (TPB) BAS agent registration(s) and qualifications

Individual BAS agent registration number \_\_\_\_\_ Expiry date \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Company/Partnership BAS agent registration number \_\_\_\_\_ Expiry date \_\_\_\_ / \_\_\_\_ / \_\_\_\_

### Qualifications

Please include details of fully completed relevant qualifications below and provide copies of your award certificate(s) and transcript(s) with this application.

Qualification	Major	Institution	Location & country	Date completed*
e.g: Bachelor of Commerce	Accounting	University of NSW	Sydney, Australia	22/10/2011

\*The date when all requirements were completed and you became eligible to receive an award.

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## E Professional work experience in accountancy and related fields

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

## F Professional services and professional indemnity (PI) insurance

Please indicate the services you offer to the public:

- ☐ BAS services prescribed by the *Tax Agent Services Act 2009* or the Tax Practitioners Board<sup>1</sup>  
☐ Payroll ☐ Software customisation and training  
☐ Bookkeeping ☐ Other<sup>2</sup> (provide details) \_\_\_\_\_

Please provide details of your current PI insurance:

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

Start date \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Expiry date \_\_\_\_ / \_\_\_\_ / \_\_\_\_

☐ Schedule and Certificate of Currency (CoC) attached<sup>3</sup>

OR

☐ I need to arrange PI Insurance with this application: please authorise the IPA's preferred insurance provider to contact me.<sup>3</sup>

<sup>1</sup>For more information, visit [www.tpb.gov.au/bas-services](http://www.tpb.gov.au/bas-services).

<sup>2</sup>Depending on services you provide to the public, you may need to apply for a Professional Practice Certificate instead of a Public BAS Practitioner Certificate. Please refer to [www.publicaccountants.org.au/membership/ppc/eligibility-and-requirements](http://www.publicaccountants.org.au/membership/ppc/eligibility-and-requirements).

<sup>3</sup>Applying for PI insurance prior to approval of your membership application is done at your own discretion. However, the IPA will not finalise your membership as a Public BAS Practitioner application until we receive your PI insurance Schedule and CoC. **Please note that the cover amount minimum is \$1,000,000 any one claim, with at least one reinstatement, preferably unlimited reinstatement.**

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## G

### Declaration

I declare that:

- I have read the IPA's membership price list and understand that I will be charged a certificate fee, an administration fee and a Public BAS Practitioner membership fee. I understand my first year membership fee is pro rata according to the month in which I join, then annually thereafter due on 1 July - refer to the link in Section I 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 I. 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 Privacy Policy<sup>4</sup> 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 the IPA has an investigations and disciplinary process<sup>5</sup> to accept written complaints against IPA members. I also understand that 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<sup>6</sup> and professional and ethical standards.
- If admitted to Public BAS Practitioner membership,
  - a. I agree to abide by the IPA Constitution, By-laws and Pronouncements and all standard setter and regulator rules, guidance statements and authoritative interpretations including, but not limited to those issued by the Accounting Professional and Ethical Standards Board (APESB), the TPB, the Australian Securities and Investments Commission (ASIC), the Australian Accounting Standards Board (AASB) and the Auditing and Assurance Standards Board (AUASB);
  - 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 complete the IPA's Public BAS Practitioner Program within six months of admission;**
  - d. I agree to maintain professional indemnity insurance that complies with IPA requirements;
  - 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;
  - f. I agree to advise the IPA should there be any business sale, merger, liquidation or litigation; and
  - g. **I understand that I must apply for a Professional Practice Certificate if I offer professional services other than BAS services as prescribed by the *Tax Agent Services Act 2009* to the public and my turnover exceeds the tax-free threshold or if I market my professional services to the public.**

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

**Full name** \_\_\_\_\_

**Signature** \_\_\_\_\_ **Date** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

<sup>4</sup>For full Privacy Policy and Collection Notice, go to [www.publicaccountants.org.au/portal/privacy-and-policy](http://www.publicaccountants.org.au/portal/privacy-and-policy).

<sup>5</sup>For the IPA Complaint Investigation and Member Disciplinary Action information, go to [www.publicaccountants.org.au/about/complaint-investigation](http://www.publicaccountants.org.au/about/complaint-investigation).

<sup>6</sup>For the IPA Constitution, By-laws and Pronouncements, go to [www.publicaccountants.org.au/about/obligations](http://www.publicaccountants.org.au/about/obligations). Failure to comply with these regulations may result in disciplinary action.

## H

### 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/ipa-program](http://www.publicaccountants.org.au/education/ipa-program).

If you would like more information, please tick here. ☐ Yes

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### Where did you hear about us?

- ☐ Contacted by an IPA staff member   ☐ Magazine   ☐ Search engine   ☐ Facebook   ☐ Twitter  
☐ YouTube   ☐ LinkedIn   ☐ IPA website chat box   ☐ University   ☐ TAFE   ☐ Friends  
☐ Work colleague   ☐ IPA member   ☐ IPA CPD events   ☐ Other: \_\_\_\_\_



### Payment details

Your application must include payment of:

- A non-refundable certificate fee of \$105.00 and a non-refundable administration fee of \$55.00; **AND**
- Public BAS Practitioner membership fees payable (see [www.publicaccountants.org.au/become-a-member/how-to-apply/fees](http://www.publicaccountants.org.au/become-a-member/how-to-apply/fees)).

### 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

Certificate fee **\$105.00**

Administration fee **\$55.00**

Public BAS Practitioner membership fee \$ \_\_\_\_\_

**Total amount due \$** \_\_\_\_\_

All fees are GST inclusive

Campaign code # \_\_\_\_\_  
(If applicable)

**Did you know** that the IPA has a *Find a Public BAS Practitioner* page on our website? If you wish to promote your business on the IPA website, once your Public BAS Practitioner membership is finalised, log into your IPA account and enter your business details on [www.publicaccountants.org.au/find-an-accountant](http://www.publicaccountants.org.au/find-an-accountant).

**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 application with required documentary evidence to your local IPA office below.

### Contact details for IPA offices

<b>New South Wales &amp; Australian Capital Territory</b> t (02) 8262 6000 e <a href="mailto:nswdivn@publicaccountants.org.au">nswdivn@publicaccountants.org.au</a>	<b>Queensland</b> t (07) 3034 0900 e <a href="mailto:glldivn@publicaccountants.org.au">glldivn@publicaccountants.org.au</a>
<b>South Australia &amp; Northern Territory</b> t (08) 8227 2255 e <a href="mailto:sadivn@publicaccountants.org.au">sadivn@publicaccountants.org.au</a>	<b>Tasmania</b> t (03) 8665 3150 e <a href="mailto:tasdivn@publicaccountants.org.au">tasdivn@publicaccountants.org.au</a>
<b>Victoria</b> t (03) 8665 3150 e <a href="mailto:vicdivn@publicaccountants.org.au">vicdivn@publicaccountants.org.au</a>	<b>Western Australia</b> t (08) 9368 7600 e <a href="mailto:wadivn@publicaccountants.org.au">wadivn@publicaccountants.org.au</a>