



## Join the IPA

Thank you for your interest in membership with the Institute of Public Accountants (IPA).

The IPA has a passion for small business. More than 75 per cent of our members are either serving small business or are small business in their own right.

The IPA is a global accounting association that is dedicated to drive benefits and value for its members. We pride ourselves on providing members with support that is flexible, responsive and solutions focused.

The IPA membership will give you high level recognition in the accounting profession, keep you up to date on technical issues and ensure your concerns are voiced with government and key industry sectors.

### Things you need to know

- The minimum qualification for admission is an Australian Diploma of Accounting (FNS50217). We also offer admission to statutory registration holders with the Tax Practitioners Board (TPB) and/or Australian Securities & Investments Commission (ASIC) and to current members of an International Federation of Accountants (IFAC) Member level body (see [www.ifac.org/about-ifac/membership/member-organizations-and-country-profiles](http://www.ifac.org/about-ifac/membership/member-organizations-and-country-profiles)).
- If you offer or plan to offer professional accounting and related services to the public for a fee, you may also need to apply for a practising certificate with your membership application. This includes you being a sole trader, principal, director, partner, shareholder or owner of a business, or billing under your own ABN. If you are a registered BAS agent with the TPB and if you provide bookkeeping and BAS services only, you are required to apply for a Public BAS Practitioner Certificate. If you provide accounting and related services and if your turnover exceeds or is expected to exceed the ATO tax-free threshold, you are required to apply for a Professional Practice Certificate.
- The IPA membership subscription year is a financial year. Members admitted during the financial year will have their membership fees calculated on a pro-rata basis.
- Assessment of your eligibility for membership requires payment of a non-refundable administration fee.

### Understanding the membership admission process

#### Step 1 Complete and sign the membership application form.

Check our website or contact your local IPA office for further information about criteria for admission, membership levels and fees.

#### Step 2 Submit your application including supporting documents to your local IPA office.

#### Step 3 The IPA will contact you to request further information, if required.

#### Step 4 Once approved, you will receive your membership certificate and welcome kit by post.

Please note:

- ✓ If any information is incomplete or required documents not submitted with the application, IPA will not be able to finalise your assessment.
- ✓ We encourage you to contact your local IPA office on 1800 625 625 if you need more information about your eligibility or assistance with any aspect of this application process.

**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) \_\_\_\_\_

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

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

Are you already on our records?  Yes: Reference number \_\_\_\_\_

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

Line 1 \_\_\_\_\_

Line 2 \_\_\_\_\_

Suburb/Town/City \_\_\_\_\_ State/Territory \_\_\_\_\_ Postcode \_\_\_\_\_

Contact phone numbers: Mobile \_\_\_\_\_ Business \_\_\_\_\_ Home \_\_\_\_\_

Email address (mandatory) \_\_\_\_\_

**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
<i>e.g: CA ANZ</i>	<i>12345</i>	<i>Australia</i>	<i>28/01/2009</i>	<i>CA</i>	<i>30/06/2020</i>

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 and Tax Institute 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).

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**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>

\*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>			
Responsibilities				
Responsibilities				
Responsibilities				
Responsibilities				
Responsibilities				
Responsibilities				
Responsibilities				

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## F Statutory registrations

Please provide details of statutory registration(s) you personally hold.

Australian Securities and Investments Commission (ASIC) registration(s) and number(s)	Tax Practitioners Board (TPB) registration(s) and number(s)
<input type="checkbox"/> Australian Financial Services (AFS) Licensee _____ <b>OR</b> <input type="checkbox"/> <b>Limited</b> AFS Licensee _____	<input type="checkbox"/> Individual BAS agent _____
<input type="checkbox"/> Australian Financial Services Authorised Representative _____ [Licensee name _____ Licence number _____ <input type="checkbox"/> AFS Licence <b>or</b> <input type="checkbox"/> Limited AFS Licence]	<input type="checkbox"/> Individual tax (financial) adviser _____
<input type="checkbox"/> Australian Financial Adviser _____ [Licensee name _____ Licence number _____ <input type="checkbox"/> AFS Licence <b>or</b> <input type="checkbox"/> Limited AFS Licence]	<input type="checkbox"/> Individual tax agent _____
<input type="checkbox"/> Registered Company Auditor _____	
<input type="checkbox"/> Official Liquidator _____	
<input type="checkbox"/> Registered Company Liquidator _____	
<input type="checkbox"/> SMSF Auditor _____	
<input type="checkbox"/> Australian Credit Licensee _____	
<input type="checkbox"/> Credit Representative _____ [Licensee Name _____ Licence number _____]	

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, if the licence is under the entity's name and you are the Responsible Manager, please provide documentary evidence issued by the ASIC.

## 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 practising certificate with your IPA membership. This includes you being a sole trader, principal, director, partner, shareholder or owner of a business, or billing under your own ABN. If you are a registered BAS agent with the TPB and if you provide bookkeeping and BAS services only, you are required to apply for a Public BAS Practitioner Certificate. If you provide accounting and related services and if your turnover exceeds or is expected to exceed the ATO tax-free threshold, you are required to apply for a Professional Practice Certificate (PPC). Please contact your local IPA office on 1800 625 625 for further information (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  Principal  Director  Shareholder  Employee

➔ Commencement date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ (dd/mm/yyyy)

Please state nature of the services provided: \_\_\_\_\_

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

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

Do you provide self-managed superannuation fund (SMSF) audit service for a fee?  Yes  No

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

Is your turnover more than \$18,200 (current threshold) annually?  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 a certificate fee, an administration fee and a 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 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 Policy<sup>1</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 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 process<sup>2</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>3</sup> and professional and ethical standards.
- If admitted to membership,
  - a. I agree to abide by the IPA Constitution, By-laws, 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 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 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 understand that I must apply for a PPC if I offer professional services 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>1</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>2</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>3</sup>For the IPA Constitution, By-laws and Pronouncements, go to <https://www.publicaccountants.org.au/about/iparulesandstandards>. 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/ipa-program](http://www.publicaccountants.org.au/education/ipa-program). If you would like more information, please tick here.  Yes

## 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**
- 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**

Membership fee \$ \_\_\_\_\_

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

All fees are GST inclusive

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

## Checklist

<input checked="" type="checkbox"/>	Please review your application and documentary evidence before submitting your application.
<input type="checkbox"/>	<b>Have completed all fields</b> each section including Section H declaration and Section J payment
<input type="checkbox"/>	Supplementary details regarding more information about you ( <i>if required – Section B</i> )
<input type="checkbox"/>	Copies of award certificates and transcripts for qualifications
<input type="checkbox"/>	Documentary evidence of your membership certificate and a receipt for your current membership renewal payment (or a letter of good standing) from the other IFAC Member level body.

**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>

## Frequently asked questions (FAQ)

### 1. What evidence do I need to provide?

If you hold a statutory registration with the TPB and/or ASIC under your name, no evidence is required at admission as long as you have provided information in section **F** in your application. Members admitted under this pathway may be subject to audit as per the declaration made in section **H**.

If you hold an eligible qualification, you need to provide copies of award certificates and transcripts for assessment. If your qualification documents are not in English, you must submit both original award certificates, transcripts and certified translations of your award certificates and transcripts by an accredited translator. Please also include any official Australian assessment outcome letter of an overseas qualification, if you have any.

If you are a current member of an IFAC Member level body, please provide current membership evidence such as a letter of good standing or current year membership renewal tax invoice.

Additional evidence may be required depending on your circumstances.

### 2. Do I need to apply for a practising certificate?

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 practising certificate with your IPA membership. This includes you being a sole trader, principal, director, partner, shareholder or owner of a business, or billing under your own ABN. Accounting and related services include but not limited to bookkeeping, BAS services, provision of tax advice and/or tax agent, accounting, audit, SMSF audit, financial planning, investment advice and/or SMSF advice, forensic accounting, insolvency and bankruptcy, restructuring advice, company secretarial, mortgage broking, compilation of financial reports, and information technology (accounting/audit software).

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

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

### 3. What fees will apply?

You are required to pay a non-refundable certificate fee of \$105.00 and a non-refundable administration fee of \$55.00. In addition to the non-refundable fees, you also need to pay a membership fee. Please see [www.publicaccountants.org.au/become-a-member/how-to-apply/fees](http://www.publicaccountants.org.au/become-a-member/how-to-apply/fees).

### 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 MIPA level member for at least seven consecutive years, and have had at least 10 years relevant work experience (the last five 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; delivered by Deakin University, is available exclusively to IPA members.

The Program consists of two awards: the Graduate Certificate in Public Accounting (GCPA) and the Master of Business Administration (MBA).

The four-unit GCPA (also known as "The Professional Sequence") has been designed as a pathway option to accommodate the needs of Associate (AIPA) members wishing to advance to Member (MIPA) level.

On successful completion of the GCPA and the Mentored Experience Program (see FAQ 7), AIPA members will be eligible to advance.

Please note that the number of units required for completion by members for the award of the GCPA and the MBA will be in part determined by underlying qualifications and in accordance with the regulations of the University.

For more information, go to <https://www.publicaccountants.org.au/education/ipaprogram/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. 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 MIPA level. For more information, go to [www.publicaccountants.org.au/education/mentored-experience-program](http://www.publicaccountants.org.au/education/mentored-experience-program).