



## Entity Membership – Professional Standards Scheme

The IPA Professional Standards (PS) Scheme allows PPC holders to have their Entity (i.e. a company) join the IPA and hold a Professional Practice Certificate (PPC) as an *Entity Member* as permitted under clause 10 of the IPA Constitution for the purpose of limiting the Entity's occupational liability under the IPA Professional Standards Scheme.

For the purposes of the IPA Entity Membership, an Entity means an Australian company that is registered with the Australian Securities & Investments Commissions ("ASIC") and has an Australian Company Number (ACN).

For a PPC holder's Entity to be admitted as an IPA Member, the following conditions must be met:

- (1) all directors of the Entity must be Members of the IPA, hold an IPA PPC and be an IPA PS Scheme Participant,  
  
or  
  
at least one director of the Entity must be an IPA Member, hold an IPA PPC and be an IPA PS Scheme Participant and any other directors of that Entity must be either Members of Chartered Accountants Australia and New Zealand ("CA ANZ") and/or CPA Australia, they must hold a PPC / Certificate of Public Practice (CPP) and be a PS Scheme participant of that other professional accounting body; and
- (2) shareholders that hold a majority of votes that may be cast at a general meeting of the company's shareholders must be Members of either the IPA and/or CA ANZ and/or CPA Australia, they must hold a PPC / CPP and be a PS Scheme participant of their professional accounting body

### Things you need to do

- Provide the company ABN and ACN.
- Attach the ASIC *Certificate of Registration of a Company*.
- Provide the names of all directors of the company.
- Provide the names of any other director of the company for the purposes Section 9 of the *Corporations Act 2001* who have not been formally appointed as a director or who is not recorded in the ASIC Company Register as a director of the Company.
- Provide the names of shareholders that hold a majority of votes that may be cast at a general meeting of the company's shareholders.
- Attach an ASIC company office holders search for all directors of the company.
- Attach a membership and CPP renewal receipt for any members of CA ANZ that are directors.
- Attach a membership and PPC renewal receipt for any members of CPA Australia that are director.
- Attach a copy of the Professional Indemnity (PI) insurance Certificate of Currency for the company that includes PI cover for all directors of the company.

#### Note:

- ✓ If any information is incomplete or some documents are not submitted with this application, the IPA will not be able to finalise your Entity membership application.
- ✓ We encourage you to contact the IPA if you need more information about your eligibility or you need assistance with the application process.

**A Your personal details**

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

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

Address \_\_\_\_\_

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

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

Email address \_\_\_\_\_

**IPA Membership number** \_\_\_\_\_

---

**B Company details**

Australian Business Number (ABN) \_\_\_\_\_

Australian Company Number (ACN) \_\_\_\_\_

Company legal name \_\_\_\_\_

Company trading name \_\_\_\_\_

Registered address \_\_\_\_\_

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

**Please attach the ASIC Certificate of Registration of a Company**

---

**C Directors of the Company**

1. Directors name \_\_\_\_\_

IPA member number \_\_\_\_\_ CA ANZ member number \_\_\_\_\_ CPA Australia member number \_\_\_\_\_

2. Directors name \_\_\_\_\_

IPA member number \_\_\_\_\_ CA ANZ member number \_\_\_\_\_ CPA Australia member number \_\_\_\_\_

3. Directors name \_\_\_\_\_

IPA member number \_\_\_\_\_ CA ANZ member number \_\_\_\_\_ CPA Australia member number \_\_\_\_\_

4. Directors name \_\_\_\_\_

IPA member number \_\_\_\_\_ CA ANZ member number \_\_\_\_\_ CPA Australia member number \_\_\_\_\_

5. Directors name \_\_\_\_\_

IPA member number \_\_\_\_\_ CA ANZ member number \_\_\_\_\_ CPA Australia member number \_\_\_\_\_

6. Directors name \_\_\_\_\_

IPA member number \_\_\_\_\_ CA ANZ member number \_\_\_\_\_ CPA Australia member number \_\_\_\_\_

7. Directors name \_\_\_\_\_

IPA member number \_\_\_\_\_ CA ANZ member number \_\_\_\_\_ CPA Australia member number \_\_\_\_\_

**Please attach the ASIC company office holders search**

**D Company Shareholders that hold a majority of votes**

- 1. Shareholders name \_\_\_\_\_  
IPA member number \_\_\_\_\_ CA ANZ member number \_\_\_\_\_ CPA Australia member number \_\_\_\_\_
  - 2. Shareholders name \_\_\_\_\_  
IPA member number \_\_\_\_\_ CA ANZ member number \_\_\_\_\_ CPA Australia member number \_\_\_\_\_
  - 3. Shareholders name \_\_\_\_\_  
IPA member number \_\_\_\_\_ CA ANZ member number \_\_\_\_\_ CPA Australia member number \_\_\_\_\_
  - 4. Shareholders name \_\_\_\_\_  
IPA member number \_\_\_\_\_ CA ANZ member number \_\_\_\_\_ CPA Australia member number \_\_\_\_\_
  - 5. Shareholders name \_\_\_\_\_  
IPA member number \_\_\_\_\_ CA ANZ member number \_\_\_\_\_ CPA Australia member number \_\_\_\_\_
  - 6. Shareholders name \_\_\_\_\_  
IPA member number \_\_\_\_\_ CA ANZ member number \_\_\_\_\_ CPA Australia member number \_\_\_\_\_
  - 7. Shareholders name \_\_\_\_\_  
IPA member number \_\_\_\_\_ CA ANZ member number \_\_\_\_\_ CPA Australia member number \_\_\_\_\_
- 

**E CA ANZ membership details**

**Attach a membership and CPP renewal receipt for Directors and Shareholders who are members of CA ANZ**

---

**F CPA Australia membership details**

**Attach a membership and PPC renewal receipt for Directors and Shareholders who are members of CPA Australia**

---

**G Company Professional Indemnity insurance**

Name of the insurer / underwriter \_\_\_\_\_  
Insured amount in any one claim (per reinstatement) \$\_\_\_\_million  
Number of reinstatements \_\_\_\_\_

**Please attach a Certificate of Currency**

---

I

**Declaration**

I declare that:

- 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 eligibility for Entity 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>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.
- 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); and
- I agree to advise the IPA should the entity I am a director of, or I become bankrupt, be charged with any criminal offence or be the subject of an adverse finding by any professional or regulatory body.

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

<p><b>1. Directors name</b></p> <p>_____</p> <p><b>Signature</b> _____ <b>Date</b> ____ / ____ / ____</p>
<p><b>2. Directors name</b></p> <p>_____</p> <p><b>Signature</b> _____ <b>Date</b> ____ / ____ / ____</p>
<p><b>3. Directors name</b></p> <p>_____</p> <p><b>Signature</b> _____ <b>Date</b> ____ / ____ / ____</p>
<p><b>4. Directors name</b></p> <p>_____</p> <p><b>Signature</b> _____ <b>Date</b> ____ / ____ / ____</p>
<p><b>5. Directors name</b></p> <p>_____</p> <p><b>Signature</b> _____ <b>Date</b> ____ / ____ / ____</p>
<p><b>6. Directors name</b></p> <p>_____</p> <p><b>Signature</b> _____ <b>Date</b> ____ / ____ / ____</p>
<p><b>7. Directors name</b></p> <p>_____</p> <p><b>Signature</b> _____ <b>Date</b> ____ / ____ / ____</p>

<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.

### **Any questions?**

Please contact the IPA on 03 8665 3148 or [andrew.best@publicaccountants.org.au](mailto:andrew.best@publicaccountants.org.au).

### **How to submit your application:**

Please scan and email your completed application with the required Certificate of Currency to [andrew.best@publicaccountants.org.au](mailto:andrew.best@publicaccountants.org.au).