



# JOIN THE IPA

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

IPA membership gives you high level recognition in the accounting profession, keeps you up to date on technical issues and ensures your concerns are voiced with government and key industry sectors.

The IPA is large enough to have influence, yet small enough to treat our members as individuals.

We pride ourselves on providing members with support that is flexible, responsive and solutions focused.

## Things you need to know

- The minimum qualification for admission is an Australian Diploma of Accounting, an Advanced Diploma of Accounting, or a Bachelor Degree in Accounting (Australian, or assessed as equivalent). Please contact your local IPA office on 1800 625 625 to discuss pathways to membership.
- Additional requirements apply if you offer or plan to offer professional accounting and related services to the public for a fee that will exceed the ATO tax-free-threshold in any one year. This includes as a partner, director or owner of a business, billing under your own ABN, or acting in a statutory capacity such as a registered tax agent or SMSF Auditor. A separate application for a Professional Practice Certificate My Public Accountant (PPC - MPA) will be required. Please contact your local IPA office on 1800 625 625 for further information.
- The IPA membership year is based on a financial year. You may apply for membership at any time throughout the year and your membership fee will be calculated on a pro-rata basis.
- Assessment of your eligibility for membership requires payment of a non-refundable application fee.

## Understanding the membership admission process

We use the information you provide in this application to assess your eligibility for membership. To assist us, please complete all sections and provide as much detail as possible.

### 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

Make sure you include:

- Your application fee and payment authorisation of your membership fees (see [www.publicaccountants.org.au/become-a-member/fees](http://www.publicaccountants.org.au/become-a-member/fees));
- Copies of all qualifications from overseas and all Australian non-core accounting qualifications

### 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



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

**Name to appear on IPA membership certificate**

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

\_\_\_\_\_  
(If left blank we will use your formal name.)

Date of birth \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (mandatory)

**Are you already on our records?**

Have you submitted an online membership application?  No  Yes: (Reference number \_\_\_\_\_)

Have you been an IPA Student Member?  No  Yes: (Student ID \_\_\_\_\_)

Have you previously been a member of the IPA?  No  Yes: (Member ID \_\_\_\_\_)

Have you attended our CPE sessions?  No  Yes: (ID number \_\_\_\_\_)

Has the IPA assessed your qualifications for immigration purposes?  No  Yes: (QAI reference \_\_\_\_\_)

**Contact details**

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

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

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

Line 3 \_\_\_\_\_

Suburb/Town/City \_\_\_\_\_ State \_\_\_\_\_ Post code \_\_\_\_\_

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

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

**B** More information about you

Have you ceased to be a member of any professional body?  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 of these questions, please attach details on a separate page.

**C** Membership of other professional bodies

PROFESSIONAL BODY	MEMBERSHIP ID	COUNTRY	ADMISSION DATE	CURRENT MEMBER LEVEL	PAID THROUGH DATE
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eg: CPA 12345 Australia 28/1/2009 ASA 31/12/2015

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**D** Qualifications

Please include details of fully completed qualifications

QUALIFICATION	MAJOR	EDUCATION INSTITUTE	LOCATION & COUNTRY	DATE COMPLETED*
eg: Bachelor of Commerce	Accounting	University of NSW	Sydney, Australia	22/10/11

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

**Supporting documents required if you do not hold an Australian core accounting qualification**

You must provide copies of award certificates and transcripts of results for relevant qualifications obtained OVERSEAS and any Australian NON-CORE ACCOUNTING qualifications.

Note: See FAQ 1 (page 6) for requirements.

**E** Current employment and relevant experience

POSITION HELD	F/T, P/T, CASUAL	NAME OF EMPLOYER	FROM	TO
eg: CFO	FT	The IPA	1/7/12	current

**F** Professional services

Additional requirements apply if you offer or plan to offer professional accounting and related services to the public for a fee that will exceed the ATO tax-free threshold in any one year. This includes as a partner, director or owner of a business, billing under your own ABN, or acting in a statutory capacity such as a registered tax agent or SMSF auditor. A separate application for a Professional Practice Certificate My Public Accountant (PPC - MPA) will be required. Please contact your local IPA office on 1800 625 625 for further information. Please also refer to FAQ 2 (page 6).

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

If you answered Yes to the above:

Business name: \_\_\_\_\_ ABN: \_\_\_\_\_

Your interest in the business:

Sole trader  Partner  Company  Director  Shareholder  Employee

If 'Yes' please state the nature of services provided: \_\_\_\_\_

Is your income from providing services more than \$18,200 (current threshold)?  Yes  No      Is this business operating part time?  Yes  No  
 Do you have any statutory registrations?  Yes  No      Are you a registered tax agent?  Yes  No  
 Do you audit Self Managed Super Funds (SMSFs)?  Yes  No      Are you a registered BAS agent?  Yes  No

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



**G Payment details**

Your application must include payment of:

- A non-refundable application fee of \$150. If you have applied on-line, your \$150 application fee has already been paid; **AND**
- Membership fees payable (see [www.publicaccountants.org.au/become-a-member/fees](http://www.publicaccountants.org.au/become-a-member/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 by email.

OFFICE USE ONLY	
Application fee (non-refundable)	\$150
Membership fee	
<b>Total amount due</b>	
Campaign code # (If applicable)	

All fees are GST inclusive

**H Declaration**

I declare that:

- I have read the Institute's membership price list and understand that I will be charged an application fee and a membership fee  
*Note: Your first year membership fee is pro rata according to the month in which you join, then annually thereafter due on July 1<sup>st</sup>. Refer to the link in Section G above*
- 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 will not become active until the payment has been received by the IPA
- I have read the Institute's Privacy Statement<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 and any offer of admission to membership at a particular level will be based on the information contained within this application
- I understand that I may be asked to produce documentary evidence to substantiate my eligibility and should I be unable to produce or otherwise prove my eligibility within 14 days I will forfeit my membership and all monies paid to the IPA
- If admitted to membership:
  - a. I agree to abide by the IPA Constitution, Regulations, Pronouncements and By-Laws<sup>2</sup>
  - 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, or undertake any public accounting services in my own right unless I meet the PPC - MPA requirements of IPA

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

Signature  Date  /  /

<sup>1</sup> Privacy Statement: The Institute of Public Accountants acknowledges the importance of privacy and of safeguarding personal information. Any personal details provided to the IPA will be protected in line with the Australian Privacy Principles and the laws and regulations regarding such matters as are applicable in Australia. We will not collect or monitor any personal information about you without your consent nor will we use or disclose to others your personal details without prior authorisation unless: it is required by the law or the courts; it is necessary because of the service you are using or for a service you have requested; or to protect the rights or property of others. This information is being gathered to process your application; you may withhold providing the information but this will make processing your application difficult. The information requested is intended only for the use of the IPA and our approved service providers. 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> The IPA Constitution, By-Laws and Pronouncements are available on the IPA website – [publicaccountants.org.au/about-us/ipa-rules-and-standards](http://publicaccountants.org.au/about-us/ipa-rules-and-standards). Failure to comply with these standards may expose a member to disciplinary action.

**I IPA Program**

The IPA Program is conducted in association with the University of New England Graduate School of Business. This is the IPA's key pathway to professional advancement. Please refer to FAQ 6 or visit [www.publicaccountants.org.au/become-a-member/ipaprogram](http://www.publicaccountants.org.au/become-a-member/ipaprogram). If you would like to be contacted by a staff member for more information on the IPA Program please tick here.  Yes



Check list

	YES	NO
Have you attached all necessary documentation?		
1 Supplementary details regarding information about you (if required - Section <b>B</b> )	<input type="radio"/>	<input type="radio"/>
3 Copies of transcripts and award certificates for qualifications obtained overseas and Australian non-core accounting qualifications	<input type="radio"/>	<input type="radio"/>
4 Authorised your credit card payment for (a) the application fee and (b) the pro-rata membership fees under Section <b>G</b> or provided a cheque made payable to The Institute of Public Accountants?	<input type="radio"/>	<input type="radio"/>
5 Signed Section <b>H</b> declaration?	<input type="radio"/>	<input type="radio"/>

Where did you hear about us?

- Contacted by IPA Staff member
- Media campaigns  TV  Radio  Magazine  Other  \_\_\_\_\_
- Institute CPE events
- Work colleagues
- Friends/associates
- Social media: Facebook  Twitter  Other  \_\_\_\_\_

IPA contact details for further information

NEW SOUTH WALES & AUSTRALIAN CAPITAL TERRITORY

**Street address** Level 10, 210 George 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

QUEENSLAND

**Street address** Level 11/300 Queen Street, Brisbane QLD 4000  
**Postal address** GPO Box 2578, Brisbane QLD 4001  
**t** (07) 3229 3983 **f** (07) 3229 8586  
**e** qldivn@publicaccountants.org.au

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

TASMANIA

**Street address** 50 Letitia Street, North Hobart TAS 7000  
**Postal address** GPO Box 244, Hobart TAS 7001  
**t** (03) 6235 0600 **f** (03) 6231 6076  
**e** tasdivn@publicaccountants.org.au

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

WESTERN AUSTRALIA

**Street address** Level 4, 1008 Hay Street Perth WA 6000  
**Postal address** PO Box 7309, Cloisters Square WA 6850  
**t** (08) 9474 1755 **f** (08) 9474 2911  
**e** wadivn@publicaccountants.org.au

OVERSEAS

**Street address** Level 6, 555 Lonsdale Street, Melbourne VIC 3000  
**Postal address** GPO Box 1637, Melbourne VIC 3001  
**t** (03) 8665 3100 **f** (03) 8665 3130  
**e** overseas@publicaccountants.org.au

HEAD OFFICE

**Street address** Level 6, 555 Lonsdale Street, Melbourne VIC 3000  
**Postal address** GPO Box 1637, Melbourne VIC 3001  
**t** (03) 8665 3100 **f** (03) 8665 3130  
**e** natoffice@publicaccountants.org.au

## Frequently asked questions

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

All applicants must complete our Membership Admission Application. If you hold an Australian award in a core accounting course or if you are a current member of an International Federation of Accountants (IFAC) Member Body or if you are a current BAS or tax agent with the Tax Practitioners Board, no evidence is required. 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 non-core accounting qualification only, you need to provide copies of award certificates and transcripts for assessment of your 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.

Additional evidence may be required depending on your circumstances.

### 2. When is a Professional Practice Certificate My Public Accountant (PPC - MPA) required?

An IPA member is required to hold a PPC-MPA if you offer or plan to offer professional accounting and related services to the public for a fee that will exceed the ATO tax-free threshold in any one year.

Accounting and related services include 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.

Statutory registrations include tax agent, tax (financial) adviser, Australian Financial Services Authorised Representative, Registered Auditor, SMSF Auditor, Registered Liquidator, Official Liquidator, Credit Representative, Registered Trustee in Bankruptcy, Licensed Municipal Auditor.

### 3. What fees will apply?

All new applicants must pay the non-refundable application fee of \$150. Membership fees are calculated on a pro-rata basis which is calculated at the time you join the IPA. Please see [www.publicaccountants.org.au/become-a-member/fees](http://www.publicaccountants.org.au/become-a-member/fees).

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

You must undertake and complete the IPA Program and the Mentored Experience Program (MEP). Your IPA Program pathway will depend upon your existing qualifications. Please refer to FAQ 6 for details on pathways.

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

You must have been a full (MIPA) 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). Members must provide a resume/contemporary references detailing their work experience (position held and duration, responsibilities and duties) when applying for advancement to FIPA.

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

The IPA Program is delivered exclusively to IPA members by the Graduate School of Business of the University of New England (UNE). Jointly designed by the IPA and UNE, the IPA Program is the only Australian professional accounting body program that provides you with a globally recognised and accredited university postgraduate qualification allowing you to obtain a Graduate Certificate in Public Accounting and/or a Master of Commerce (Public Accounting); whilst allowing you to meet the educational requirements needed to advance your membership to Member (MIPA) status. It is conducted online. With no classes to attend, you can study at your own pace and on your own terms.

Associate (AIPA) members must complete the IPA Program to satisfy the educational requirements for advancement to full (MIPA) membership. There are two IPA Program pathways – entry via

- I. a Diploma of Accounting or an Advanced Diploma of Accounting – must complete the Master of Commerce (Public Accounting); and
- II. a Bachelor degree in Accounting – need only complete the Graduate Certificate in Public Accounting.

Completion of the IPA Program and the IPA Mentored Experience Program (MEP) is required for advancement to full (MIPA) membership.

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

The Mentored Experience Program (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 MIPA level. Please see [www.publicaccountants.org.au/students/mentored-experience-program](http://www.publicaccountants.org.au/students/mentored-experience-program).

#### PLEASE NOTE:

- If any information is incomplete or documents not submitted with the application IPA will be unable to finalise your assessment.
- We encourage you to speak to your IPA Divisional Office if you require clarification of your eligibility for membership or assistance with any aspect of this application process.