



# 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. We also offer admission to statutory registration holders with the Tax Practitioners Board (TPB) or/and Australian Securities & Investments Commission (ASIC) and to current members of an International Federation of Accountants (IFAC) Member body. Please contact your local IPA office on 1800 625 625 to discuss membership.
- 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 practicing certificate with your membership application. This includes you being a partner, director, 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 Tax Practitioners Board (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 annual gross income exceeds or is expected to exceed the ATO tax-free-threshold, you are required to apply for a Professional Practice Certificate My Public Accountant (PPC - MPA). Please contact your local IPA office on 1800 625 625 for further information.
- 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 application fee.

## Understanding the membership admission process

For your eligibility assessment, 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 to your local IPA office

Make sure you include:

- Your credit card details for your application fee and membership fee (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 qualifications with a non-accounting major

### 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?**  No  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 \_\_\_\_\_ Postcode \_\_\_\_\_

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

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

**(B) More information about you**

Have you ever been declared bankrupt or insolvent?  No  Yes

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

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

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

Have you been the subject of an unfavourable decision by a professional body and/or a regulator?  No  Yes

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

**(C) Membership of other professional bodies**

PROFESSIONAL BODY	MEMBERSHIP ID	COUNTRY	ADMISSION DATE	CURRENT MEMBER LEVEL	PAID THROUGH DATE
-------------------	---------------	---------	----------------	----------------------	-------------------

eg: CAANZ 12345 Australia 28/1/2009 FCA 30/6/2017

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



**D** Qualifications

Please include details of fully completed qualifications

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

\*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 qualification with an accounting major**

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

Note: See FAQ 1 (page 7) for requirements.

**E** Professional work experience in accountancy and related fields

FROM	TO	POSITION	F/T, P/T, Casual	EMPLOYER NAME
<i>Eg: 8/6/2012</i>	<i>Current</i>	<i>Partner</i>	<i>F/T</i>	<i>Accounting for you</i>
<b>Responsibilities</b>	<i>Tax returns for individuals, business consulting, SMSF audits, financial reporting. Supervising two accountants.</i>			
From	TO	POSITION	F/T, P/T, Casual	EMPLOYER NAME
<b>Responsibilities</b>				
FROM	TO	POSITION	F/T, P/T, Casual	EMPLOYER NAME
<b>Responsibilities</b>				
FROM	TO	POSITION	F/T, P/T, Casual	EMPLOYER NAME
<b>Responsibilities</b>				
FROM	TO	POSITION	F/T, P/T, Casual	EMPLOYER NAME
<b>Responsibilities</b>				

**F** Statutory registrations

Please include details of your statutory registration(s).

AUSTRALIAN SECURITIES AND INVESTMENTS COMMISSION (ASIC) REGISTRATIONS	TAX PRACTITIONERS BOARD (TPB) REGISTRATIONS
<input type="radio"/> Australian Financial Services Authorised representative: No. _____ (licensee name: _____ Licence No. _____)	<input type="radio"/> Individual BAS agent: No. _____
<input type="radio"/> Australian Financial Services Licence (AFSL): No. _____ <input type="radio"/> Limited Australian Financial Services Licence (LAFSL): 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 tax (financial) adviser: No. _____
<input type="radio"/> Registered Company Auditor: No. _____	<input type="radio"/> Individual tax agent: No. _____
<input type="radio"/> Official Liquidator: No. _____	
<input type="radio"/> Registered Liquidator: No. _____	
<input type="radio"/> SMSF Auditor: No. _____	
<input type="radio"/> Credit Licence: 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 AISC or/and TPB website(s). However, for an Australian Financial Services Licence (Both AFSL and LAFSL), 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 at the same time. This includes you being a partner, director, 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 Tax Practitioners Board (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 annual gross income exceeds or is expected to exceed the ATO tax-free-threshold, you are required to apply for a Professional Practice Certificate My Public Accountant (PPC - MPA). Please contact your local IPA office on 1800 625 625 for further information. Please also refer to FAQ 2 (page 7).

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

- |  |                           |                          |
|--|---------------------------|--------------------------|
| Do you provide BAS agent services to clients?  | <input type="radio"/> Yes | <input type="radio"/> No |
| Do you provide tax advice in relation to financial planning to clients?                  | <input type="radio"/> Yes | <input type="radio"/> No |
| Do you provide tax agent services to clients?  | <input type="radio"/> Yes | <input type="radio"/> No |
| Do you audit Self Managed Super Funds (SMSFs)?   | <input type="radio"/> Yes | <input type="radio"/> No |
| Do you provide financial planning services, investment advice or SMSF advice to clients? | <input type="radio"/> Yes | <input type="radio"/> No |
| Is your income from providing services more than \$18,200 (current threshold)?           | <input type="radio"/> Yes | <input type="radio"/> No |

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

**Go to the next page**



## 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 1 July. Refer to the link in Section J on the next page*
- 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 and I will receive a tax invoice by email upon payment
- 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
- I understand that the IPA has an investigations and disciplinary process<sup>2</sup> 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 admitted to membership:
  - a. I agree to abide by the IPA Constitution, Regulations, Pronouncements and By-Laws<sup>3</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> For the IPA Complaint Investigation and Member Disciplinary Action information, go to [www.publicaccountants.org.au/aboutus/complaint-investigation-member-disciplinary-action](http://www.publicaccountants.org.au/aboutus/complaint-investigation-member-disciplinary-action).

<sup>3</sup> For the IPA Constitution, By-Laws and Pronouncements, go to [www.publicaccountants.org.au/aboutus/ipa-rules-and-standards](http://www.publicaccountants.org.au/aboutus/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 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 more information, please tick here.  Yes

### Where did you hear about us?

- Contacted by an IPA staff member  TV  Radio  Magazine  Search engine  Facebook  Twitter  Youtube  IPA website chat box
- University or TAFE  Friends  Work colleagues  IPA member  IPA CPD events
- Other \_\_\_\_\_

Go to the next page



**J** Payment details

Your application must include payment of:

- A non-refundable application fee of; **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 \_\_\_\_\_ \$150  
(non-refundable)

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

Total amount due \_\_\_\_\_

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

All fees are GST inclusive

Checklist

	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>J</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"/>

IPA contact details for further information

<p><b>NEW SOUTH WALES &amp; AUSTRALIAN CAPITAL TERRITORY</b>  <b>Street address</b> Level 10, 210 George Street, Sydney NSW 2000  <b>Postal address</b> Locked Bag A6090, Sydney South NSW 1235  <b>t</b> (02) 8262 6000 <b>f</b> (02) 9251 5201  <b>e</b> <a href="mailto:nswdivn@publicaccountants.org.au">nswdivn@publicaccountants.org.au</a></p>	<p><b>QUEENSLAND</b>  <b>Street address</b> Level 11/300 Queen Street, Brisbane QLD 4000  <b>Postal address</b> GPO Box 2578, Brisbane QLD 4001  <b>t</b> (07) 3229 3983 <b>f</b> (07) 3229 8586  <b>e</b> <a href="mailto:qlddivn@publicaccountants.org.au">qlddivn@publicaccountants.org.au</a></p>
<p><b>SOUTH AUSTRALIA &amp; NORTHERN TERRITORY</b>  <b>Street address</b> Level 2, 422 King William Street, Adelaide  <b>Postal address</b> PO Box 6368, Halifax Street SA 5000  <b>t</b> (08) 8227 2255 <b>f</b> (08) 8227 1211  <b>e</b> <a href="mailto:sadivn@publicaccountants.org.au">sadivn@publicaccountants.org.au</a></p>	<p><b>TASMANIA</b>  <b>Street address</b> Level 1, 116 Bathurst Street Hobart TAS 7000  <b>Postal address</b> GPO Box 244, Hobart TAS 7001  <b>t</b> (03) 6235 0600 <b>f</b> (03) 6231 6076  <b>e</b> <a href="mailto:tasdivn@publicaccountants.org.au">tasdivn@publicaccountants.org.au</a></p>
<p><b>VICTORIA</b>  <b>Street address</b> Level 6, 555 Lonsdale Street, Melbourne VIC 3000  <b>Postal address</b> GPO Box 1637, Melbourne VIC 3001  <b>t</b> (03) 8665 3150 <b>f</b> (03) 8665 3151  <b>e</b> <a href="mailto:vicdivn@publicaccountants.org.au">vicdivn@publicaccountants.org.au</a></p>	<p><b>WESTERN AUSTRALIA</b>  <b>Street address</b> Level 4, 1008 Hay Street Perth WA 6000  <b>Postal address</b> PO Box 7309, Cloisters Square WA 6850  <b>t</b> (08) 9474 1755 <b>f</b> (08) 9474 2911  <b>e</b> <a href="mailto:wadivn@publicaccountants.org.au">wadivn@publicaccountants.org.au</a></p>
<p><b>OVERSEAS</b>  <b>Street address</b> Level 6, 555 Lonsdale Street, Melbourne VIC 3000  <b>Postal address</b> GPO Box 1637, Melbourne VIC 3001  <b>t</b> (03) 8665 3100 <b>f</b> (03) 8665 3130  <b>e</b> <a href="mailto:overseas@publicaccountants.org.au">overseas@publicaccountants.org.au</a></p>	<p><b>HEAD OFFICE</b>  <b>Street address</b> Level 6, 555 Lonsdale Street, Melbourne VIC 3000  <b>Postal address</b> GPO Box 1637, Melbourne VIC 3001  <b>t</b> (03) 8665 3100 <b>f</b> (03) 8665 3130  <b>e</b> <a href="mailto:natoffice@publicaccountants.org.au">natoffice@publicaccountants.org.au</a></p>

## Frequently asked questions

### 1. 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 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 as long as you have provided information in your application. However, if the statutory registration is the ASIC Australian Financial Services Licence (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 at the same time. This includes you being a partner, director, 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 Tax Practitioners Board (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 annual gross income exceeds or is expected to exceed the ATO tax-free threshold, you are required to apply for a Professional Practice Certificate My Public Accountant (PPC - MPA).

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 application fee of \$150.00. In addition to the application fee, you also need to pay a membership fee. 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. 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 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. an Australian 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.