

MEMBERSHIP UPGRADE

APPLICATION FORM FOR CURRENT MEMBERS

Membership enquiries: Please visit taxinstitute.com.au for more information. Alternatively, please contact us via email at membership@taxinstitute.com.au or phone on +61 2 8223 0060.

PLEASE PRINT IN BLOCK LETTERS.

How to apply for Associate, Fellow or Chartered Tax Adviser designations

- Step 1: Complete this Application Form in full.
Step 2: Sign the declaration.
Step 3: Attach documents to prove your eligibility criteria and experience.
Step 4: Return form and documentation to The Tax Institute.

@ Email

membership@taxinstitute.com.au

Fax

+61 2 8223 0077

Mail

Membership Division, The Tax Institute
GPO Box 1694 Sydney, NSW 2001

Application for Associate, Fellow or Chartered Tax Adviser designation

I, _____ (full name to appear on membership certificate), member no. _____ hereby apply for the Chartered Tax Adviser, Fellow or Associate designation and have enclosed documents to support my application on the criteria selected.

Criteria for Chartered Tax Adviser (voting member)

A person will be eligible to apply to be admitted as a Chartered Tax Adviser of The Tax Institute if he or she:

- Meets the core voting membership criteria (per below); and
- Meets the Fellow membership criteria (per below); and
- Has successfully passed The Tax Institute's CTA3 Advisory exam.

Criteria for Fellow (voting member)

A person will be eligible to apply to be admitted as a Fellow of The Tax Institute if he or she:

- Meets the core voting membership criteria (per below); and
- Has a minimum of 3 years' relevant tax experience; and
- Satisfies one or more of the following criteria (*please tick each criterion that is met*):
 - Has successfully passed The Tax Institute's CTA1 Foundations, CTA2A Advanced and CTA2B Advanced assessments or an equivalent qualification from The Tax Institute accredited education provider register¹; or
 - Has been awarded a Master of Tax or an equivalent Masters qualification from The Tax Institute accredited Australian tertiary institution register².

Criteria for Associate (voting member)

A person will be eligible to apply to be admitted as an Associate of The Tax Institute if he or she:

- Meets the core voting membership criteria (per below); and
- Has a minimum of 1 year's relevant tax experience; and
- i. Satisfies one or more of the following criteria (*please tick each criterion that is met*):
 - Has successfully passed The Tax Institute's CTA1 Foundations or an equivalent qualification from The Tax Institute accredited education provider register²; or
 - Is a member of ICAA, CPA, IPA, Barrister or Solicitor; or
 - Is a voting member of another Registered Tax Agent Association (RTAA)³; or
- ii. Has a minimum of 8 years' full-time experience in providing tax agent services in the past 10 years.

Each Chartered Tax Adviser, Fellow and Associate applicant (as voting members of The Tax Institute) must meet the following criteria

The applicant must:

- Be of good fame, integrity and character⁴; and
- Satisfies one or more of the following criteria (*please tick each criterion that is met*):
 - Hold a degree or postgraduate award from an Australian tertiary institution or an equivalent institution in the discipline of accounting; or
 - Hold a diploma or higher award from an Australian registered training organisation (RTO) or equivalent institution in the discipline of accounting; or
 - Have completed the academic qualifications required to be an Australian legal practitioner; or
 - Registered as a tax agent; or
 - A Registered Tax Agent or nominee immediately before 1 March 2010 and a voting member of a recognised professional association immediately before 1 March 2010; or
 - Have the equivalent of 8 years' full-time experience in providing tax agent services in the past 10 years.

Declaration

I agree to be bound by the Constitution of The Tax Institute and acknowledge that all voting members are required to complete 30 CPD hours each year, of which 30 hours must be structured for Chartered Tax Adviser members, and 15 hours must be structured for Fellow and Associate members.

I hereby declare that I am of good fame, integrity and character and have not been involved in any conduct that is or could be a Disciplinary Event⁵ within the meaning of the By-Laws.

Signature: _____

Date: _____

I have attached copies of relevant documents that prove my eligibility and experience.

- | | |
|--------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Degree or diploma transcript; or | <input type="checkbox"/> A letter from your employer confirming you have the required relevant tax experience; or |
| <input type="checkbox"/> Current legal practising certificate; or | <input type="checkbox"/> A copy of your current resumé. |
| <input type="checkbox"/> Current registered tax agent certificate; and (if required) | |
| <input type="checkbox"/> Current RTAA voting membership certificate; and | |

Membership fee

If you are upgrading from Affiliate membership, please note that an additional membership fee payment is required.

Membership period	Australian member price	Overseas member price
1 July 2016 to 30 June 2017	<input type="checkbox"/> \$195.00 (inc \$17.73 GST)	<input type="checkbox"/> \$177.28
1 October 2016 to 30 June 2017	<input type="checkbox"/> \$146.25 (inc \$13.30 GST)	<input type="checkbox"/> \$132.95
1 January 2017 to 30 June 2017	<input type="checkbox"/> \$97.50 (inc \$8.86 GST)	<input type="checkbox"/> \$88.02
1 April 2017 to 30 June 2017	<input type="checkbox"/> \$48.75 (inc \$4.43 GST)	<input type="checkbox"/> \$44.32

Personal information

First name: _____

Last name: _____

Please provide full name to appear on membership certificate: _____

Payment method

I enclose a cheque* for \$ _____

*Please make cheque payable to The Tax Institute in Australian dollars.

Card no. / / /

Expiry date: _____

Please charge my credit card \$ _____

Cardholder's signature: _____

Card type:

AMEX Visa MasterCard Diners

Cardholder's name: _____

¹A register of Tax Institute accredited education providers and equivalent qualifications are provided at taxinstitute.com.au.

²A register of Tax Institute accredited Masters level qualifications are provided at taxinstitute.com.au.

³A register of Recognised Tax Agent Associations (RTAA) are provided at taxinstitute.com.au.

⁴Statutory declaration requirements are provided at taxinstitute.com.au.

⁵Each of the following is a Disciplinary Event: (a) engaging in conduct which: (i) is unbecoming of a Member; (ii) is prejudicial to or not in the best interests of the Institute; and/or (iii) brings discredit on the Institute; (b) engaging in derogatory or discriminatory conduct or harassment of any type; (c) failing to observe a proper standard of professional care, skill or competence; (d) failing to comply with a written direction issued by the National Council in accordance with the Constitution or By-Laws of the Institute regarding good conduct or administration of the Institute; (e) being the subject of an adverse finding in relation to his or her professional conduct, competence or recognition by any body or authority having jurisdiction or competence to do so; (f) being convicted of a Serious Offence; (g) being found to have acted dishonestly in any civil proceedings in a court in Australia or elsewhere; (h) involuntarily ceasing to be a director by virtue of the Corporations Act 2001 (Cth) (Corporations Act) or being prohibited from being a director by reason of any order made under the Corporations Act; (i) becoming bankrupt or assigning his or her estate or entering into a deed of arrangement for the benefit of his or her creditors; (j) failing to comply with the Constitution or any By-Law of the Institute, including the Code of Professional Conduct (By-Law 15); (k) failing to assist an Investigator to the extent required by the By-Laws in the carrying out of an investigation of a Complaint; (l) acting contrary to the By-Laws, hindering or obstructing an Investigator in the carrying out of an investigation of a Complaint; (m) failing to acknowledge or comply with a reasonable written direction of the Institute prior to, or in the course of, the carrying out of an investigation of a Complaint; and (n) for any reason, ceasing to be a person of good fame, integrity and character. Please note: All prices are subject to change without notice. Total amount includes GST where applicable (Australian Dollars only).



THE TAX INSTITUTE