

ASSOCIATE OR FELLOW

APPLICATION FORM FOR CURRENT MEMBERS

This form must be returned to The Tax Institute before
30 September 2012.

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

How to apply for Associate or Fellow designations

- Step 1: Complete this Associate or Fellow 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.



+61 2 8223 0077



membership@taxinstitute.com.au



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

Application for Associate or Fellow designation

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

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 Certificate in Foundation Tax and Certificate in Applied Tax 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
- Satisfies one or more of the following criteria (*please tick each criterion that is met*):
 - Has successfully passed The Tax Institute's Certificate in Foundation Tax or an equivalent qualification from The Tax Institute accredited education provider register¹; or
 - Is a member of ICAA, CPA, IPA; or
 - Is a barrister or solicitor; or
 - Is a voting member of another Registered Tax Agent Association (RTAA)³.

Core voting membership 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 as a Fellow or Associate member I am required to complete 30 hours of CPD each year, of which 15 hours must be structured.

Signature: _____

Date: _____

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

- | | |
|--|---|
| <input type="checkbox"/> Degree or diploma certificate; or | <input type="checkbox"/> Current RTAA voting membership certificate; and |
| <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 résumé. |
| <input type="checkbox"/> Current Registered Tax Agent certificate; and (if required) | |

¹Statutory declaration requirements are provided at www.taxinstitute.com.au.

²A register of Tax Institute accredited education providers and equivalent qualifications are provided at www.taxinstitute.com.au.

³A register of Tax Institute accredited Masters level qualifications are provided at www.taxinstitute.com.au.

⁴A register of Recognised Tax Agent Associations (RTAA) are provided at www.taxinstitute.com.au.



THE TAX INSTITUTE