



THE TAX INSTITUTE

APPLICATION FOR ADVANCED STANDING

APPLICATION FOR ADVANCED STANDING FORM | WD

Date of issue: June 2017

1 Candidate information

Member no.:

Title: Mr Mrs Miss Ms Other (please specify) Date of birth:

First name*: Last name:

*This will appear on your testamur.

Have you ever been convicted of a criminal offence, been subject to disciplinary action by a statutory, professional, or other body, involuntarily ceased to be a director by virtue of the (Corporations Act), or been prohibited from being a director by reason of any order made under the Corporations Act?

Yes (attach relevant supporting documentation) No

2 Contact information

Company:

Position:

Address:

Suburb: State: Postcode:

Country:

Email:

Telephone: Mobile:

3 Exemption Applied for

- | | |
|---------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|
| <input type="checkbox"/> ATL001 CTA1 Foundations | <input type="checkbox"/> ATL006 CommLaw3 Property Law |
| <input type="checkbox"/> ATL003 CTA2A Advanced | <input type="checkbox"/> ATL007 Advanced Superannuation |
| <input type="checkbox"/> ATL004 CTA2B Advanced | <input type="checkbox"/> ATL008 Tax for Trusts in Estate Planning and Wealth Management |
| <input type="checkbox"/> ATL002 CommLaw1 Australian Legal Systems | <input type="checkbox"/> ATL009 Corporate Tax |
| <input type="checkbox"/> ATL005 CommLaw2 Entities and Business Structures | |

4 Evidence table

Completed TTI Subjects	Applying for exemption from
<input type="checkbox"/> CTA1 Foundations or <input type="checkbox"/> Certificate in Foundation Tax or <input type="checkbox"/> Foundation Tax or Tax for Financial Advising	<input type="checkbox"/> ATL001 CTA1 Foundations
<input type="checkbox"/> CTA2 Advanced or Certificate in Applied Tax or <input type="checkbox"/> Applied Tax	<input type="checkbox"/> ATL003 CTA2A Advanced <input type="checkbox"/> ATL004 CTA2B Advanced
<input type="checkbox"/> CommLaw1 Australian Legal Systems	<input type="checkbox"/> ATL002 CommLaw1 Australian Legal Systems
<input type="checkbox"/> CommLaw2 Entities and Business Structures	<input type="checkbox"/> ATL005 CommLaw2 Entities and Business Structures
<input type="checkbox"/> CommLaw3 Property Law	<input type="checkbox"/> ATL006 CommLaw3 Property Law
<input type="checkbox"/> CTA3 Advisory	<input type="checkbox"/> ATL007 Advanced Superannuation, or <input type="checkbox"/> ATL008 Tax for Trusts in Estate Planning and Wealth Management, or <input type="checkbox"/> ATL009 Corporate Tax

5 Checklist

Compulsory Evidence

- I have completed the Exemptions Applied for in Section 3
- I have completed the Evidence Table in Section 4

6 Candidate declaration

All candidates are required to complete the following declaration to process this application to enrol in an education subject.

Education

I confirm that I have read and accept The Tax Institute's education policies and procedures⁶ and privacy policy^{6A}.

I confirm that the information provided in the candidate declaration and supporting documentation is true and correct, and I agree to abide by The Tax Institute's rules, policies, procedures, and regulations.

Deferring and withdrawing

Terms, conditions and fees apply if deferring or withdrawing⁶.

Withdrawal from a subject must be received in writing prior to the subject commencement date (fees will not be refunded after the subject commencement date except under exceptional circumstances). Withdrawal will incur an administration fee of 20% of the subject fee.

Multiple changes to subject enrolments may incur an additional fee.

Membership

I hereby declare that I am of good fame, integrity and character⁷ and have not been involved in any conduct that is or could be a Disciplinary Event⁶ within the meaning of the By-Laws.

I understand that as a new-member, I will receive Affiliate (non-voting) membership and if I wish to receive voting membership, I must notify and provide the supporting to prove my eligibility at the time of enrolment.

I understand that as a new member enrolling into the CTA3 Advisory subject, I will receive Fellow (voting) membership which requires 15 hours of structured CPD per year.

Upon successful application, I authorise you to place my name on the appropriate Register of Members and agree to be bound by the Constitution of The Tax Institute.

I hereby declare that the information in this application is true and correct. I authorise the investigation of all statements made by me with respect to this application.

Signature:

Date of signature:

The Tax Institute is not CRICOS registered and its courses are not open to students as defined under the ESOS Act.

¹ Fees are in Australian dollars (AUD) and are subject to change without notice.

² Registration and membership fees are inclusive of GST. To enrol in an education subject it is a requirement to become a member of The Tax Institute. All new members will be required to pay \$320 and will receive Affiliate membership valued at \$454.00 upon enrolment (Fellow membership required for CTAG Advisory) until June 30 in the subsequent calendar year. You are also eligible to upgrade to voting membership valued at \$649.00 for no additional cost if you meet the required membership eligibility criteria.

³ Subject fees do not attract GST.

⁴ Face-to-face delivery is subject to minimum lecture numbers.

⁵ Visit taxinstitute.com.au for the application form and information on credit for recognised prior learning.

⁶ Visit taxinstitute.com.au for education policies.

^{6A} Visit taxinstitute.com.au for Privacy Policy.

⁷ Visit taxinstitute.com.au for statutory declaration requirements.

⁸ Each 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.

Collection notice

The Tax Institute (TTI) complies with its obligations under the Privacy Act 1988 (Cth) with respect to how it handles personal information. TTI collects, uses, holds and discloses your personal information (including sensitive information, such as health information) for a range of purposes, such as administrative purposes relating to membership of TTI and TTI's courses (including assessment of eligibility and providing courses), compliance with Government and statutory requirements, provision of information relating to TTI's services and member benefits and to conduct market research. If you do not provide the personal information requested by TTI, it may not be able to provide its services to you, such as assessment of your course enrolment application. TTI does not disclose criminal record information to third parties. TTI usually discloses your personal information to entities such as your sponsoring employer (with respect to your course records and results), The Tax Practitioners Board, TTI's business partners for marketing purposes, IT companies and other companies who provide administrative and other services to TTI and government bodies, such as the Tertiary Education and Quality Standards Agency. TTI may disclose personal information to overseas recipients in countries such as the United States of America and India. For further information on how TTI collects, uses, holds and discloses personal information, please see its privacy policy at www.taxinstitute.com.au. The Privacy Policy also contains information on how to request access to or correction of your personal information and how to make a complaint about a breach of privacy. By submitting your application to TTI, you confirm that you have read TTI's Privacy Policy and you consent to your personal information being collected, used and held by TTI and disclosed to third parties as set out in this notice and in accordance with TTI's Privacy Policy. If you do not want your personal information to be used by TTI or disclosed to third parties, for the purpose of direct marketing, please contact us in writing at membership@taxinstitute.com.au.

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