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IN THE LOOP
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MEMBERSHIP

Join Australia’s leading professional association in tax

taxinstitute.com.au
Tax is a dynamic profession, affecting everyone from government and large corporations, to small business and individuals.

To provide great advice, tax practitioners must remain up to date with the changing landscape.
Members of The Tax Institute belong to a community of the most knowledgeable tax practitioners. Membership opens the door to powerful resources, progressive education and influential networks. If you work in tax, membership of The Tax Institute is essential.

The mark of expertise
Taxpayers want to know that their practitioner has the right qualifications to manage their affairs. Constantly evolving tax law and administration means that tax practitioners need to keep their skills and knowledge up to date with the changing landscape.

Membership of The Tax Institute confirms to employers and taxpayers that they are dealing with a tax professional who has proved themselves to be of the highest calibre and equipped to provide the best tax advice. For those just starting out in tax, it will serve to enhance their career.

Global recognition
The Chartered Tax Adviser designation is an internationally recognised and respected mark of technical excellence and professional integrity. Attaining this designation means joining a network of thousands of Chartered Tax Advisers worldwide who are recognised for their tax expertise on the international stage.

Stand out from the crowd
We can all profit from an exchange of ideas, whether a recent graduate or a practitioner with many years’ experience. Our edge comes from being the only body devoted exclusively to tax that is led by tax experts to benefit tax experts. It’s this reputation for being at the forefront of the industry that helps our members to raise their profiles and strengthen their credentials.

If tax is your specialty, I invite you to join our community and enhance your professional status.

Yours sincerely,

Noel Rowland
CEO
The Tax Institute
The Tax Institute was born in 1943, when inspiration struck a Sydney accountant named Harold Irving. He decided to try and improve the position of tax agents, tax law and its administration. Since then, Australia’s tax system has changed greatly. Likewise The Tax Institute has evolved, grown and become increasingly respected. Dynamic and responsive, the Institute has helped shape changes that benefit its members and the taxpaying community.

Collaboration is our cornerstone
Almost seven decades later, our values, friendships and the unselfish desire to learn from each other are central to our success. The Institute is known for its committed volunteers and the altruistic sharing of knowledge. Members are actively involved with the Institute, ensuring that the technical products and services on offer meet the varied needs of tax professionals.

Committed to the tax profession
Today we are Australia’s leading professional association and educator in tax, with offices in most major cities. Focusing solely on tax, the Institute provides the best resources, education and networks. Our mission is to equip tax professionals with everything they need to demonstrate the highest level of expertise and increase the advancement of public knowledge and understanding.

We are also committed to propelling members into the future and onto the global stage with the introduction of the Chartered Tax Adviser designation.
Take your career to the next level by achieving Chartered Tax Adviser status.
GIVE YOURSELF AN EDGE

Our membership benefits

Status and recognition
As a member, you gain the status and recognition of belonging to a community that is known to attract the best and brightest tax professionals. Raise your profile by volunteering or joining a committee or council, and help improve your status as an expert in tax by giving your knowledge back to the profession.

International recognition
Take your career to the next level by achieving Chartered Tax Adviser status. Now the highest membership category and recognised internationally, the designation will highlight your reputation as a tax professional of the highest calibre.

Journals and newsletters
Stay informed with all the latest tax news, rulings, developments, issues and tips with our sought-after monthly journal *Taxation in Australia*® and leading weekly tax newsletter *TaxVine*®.

Research services
Gain access to one of the most extensive tax research libraries in Australia, or take advantage of the free TaxLine research service provided by our dedicated tax researchers.

Tax research and policy
Help improve the industry by contributing to submissions on tax legislation and administration, state revenue draft rulings and guidelines, ATO issues, and government tax policy initiatives.

Professional development
In addition to the extensive education and training services that we offer to tax professionals, members are able to gain exclusive access to complementary podcasts, presentations, technical papers and more.

Extensive discounts
Build your tax knowledge with significant discounts on premium structured education programs, live and online CPD events, and dedicated publications that are all designed by leading practitioners.

Business alliance partner offers
Enjoy a number of third party promotions and discounts, and exposure to the latest products and services for your business.

Please visit taxinstitute.com.au for further details.
OUR MEMBERS

Join the *best* and brightest

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**The essential partner to all tax professionals**

“As a small tax practitioner, I value my membership of The Tax Institute. It provides me with access to relevant tax education by specialists in the field, reference materials, weekly emails of current issues in tax, and an excellent annual conference with valuable social and networking opportunities.”

Geoffrey Rush, FTI
Partner, Donnelly Rush

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**Led by tax experts, to benefit tax experts**

“After university, I gained practical experience in an accounting and law firm and became a member of The Tax Institute before settling into a career in tax. Through my involvement in The Tax Institute, I can play a role in the development of other young tax professionals, while continuing to broaden my own set of skills.”

Kirsten Fish, FTI
Partner, Clayton Utz

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We have thousands of members, ranging from new entrants to experienced tax agents, accountants, lawyers and practitioners in all levels of business, government and academia.

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Our members belong to a community of the most knowledgeable practitioners. Joining this community opens a door to powerful resources, progressive education and influential networks.

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**Start your journey**

If you are considering membership in our exclusive network and have any questions, please contact us on 02 8223 0060 or email membership@taxinstitute.com.au.
**Four levels of membership** are available to tax professionals. Each category demonstrates a different level of expertise and has its own eligibility criteria, including education and relevant experience requirements.

The four levels are:
- Chartered Tax Adviser (CTA)
- Fellow (FTI)
- Associate (ATI)
- Affiliate.

### Affiliate (non-voting member) criteria
A person will be eligible to apply to be admitted as an Affiliate of The Tax Institute if they:

1. are of good fame, integrity and character; and
2. satisfy one or more of the following criteria:
   - (a) have passed The Tax Institute’s Certificate in Foundation Tax or equivalent;\(^\text{a}\)
   - (b) would otherwise qualify for admission as an Associate member but do not have the experience;
   - (c) are enrolled in The Tax Institute’s Certificate in Applied Tax course;
   - (d) are an employee, working in tax of the Commonwealth or a state revenue authority; and/or
   - (e) have an interest in the affairs of The Tax Institute and its National Council resolves to admit them as an Affiliate.

### Associate (ATI) (voting member) criteria
A person will be eligible to apply to be admitted as an Associate of The Tax Institute if they:

1. meet the core voting membership criteria;\(^*\) and
2. have a minimum of one year’s relevant tax experience; and
3. satisfy one or more of the following criteria:
   - (a) have passed The Tax Institute’s Certificate in Foundation Tax or an equivalent;\(^\text{a}\)
   - (b) are a member of the ICAA, CPA, IPA;
   - (c) are a barrister or solicitor; and/or
   - (d) are a voting member of another registered tax agent association.\(^*\)
**Core voting membership criteria**

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

1. be of good fame, integrity and character; and
2. satisfy one or more of the following:
   
   (a) hold a degree or postgraduate award from an Australian tertiary institution or an equivalent institution in the discipline of accounting; 
   
   (b) hold a diploma or higher award from an Australian registered training organisation or equivalent institution in the discipline of accounting; 
   
   (c) have completed the academic qualifications required to be an Australian legal practitioner; 
   
   (d) be registered as a tax agent; 
   
   (e) be 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; and/or 
   
   (f) have the equivalent of eight years’ full-time experience in providing tax agent services in the past 10 years.

*Registers available at taxinstitute.com.au/CTA

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**Fellow (FTI) (voting member) criteria**

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

1. meet the core voting membership criteria;* and
2. have a minimum of three years’ relevant tax experience; and
3. satisfy one or more of the following criteria:
   
   (a) have passed The Tax Institute’s Certificate in Foundation Tax and Certificate in Applied Tax assessments or equivalent;* and/or 
   
   (b) have been awarded a Master of Tax or equivalent.*

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**Chartered Tax Adviser (CTA) (voting member) criteria**

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

1. meet the core voting membership criteria;* and
2. meet the Fellow membership criteria; and
3. have passed The Tax Institute’s Chartered Tax Adviser exam.
You can start enjoying our member benefits from the date we receive your application. It will be presented for approval to the relevant state council at its next monthly meeting.
HOW TO APPLY
Little form, big returns

You’re three easy steps away from becoming a member of The Tax Institute.

1. Select your membership level (page 8) and complete the application form.

2. Attach copies of supporting documents that prove your eligibility.

3. Fax, email or post your form and documents to us.

Application forms can be downloaded from our website, taxinstitute.com.au, or you can request an electronic or hard copy by contacting us on the details below.

Enquiries: 61 2 8223 0060
Fax: 61 2 8223 0077
Email: membership@taxinstitute.com.au
Mail: Membership Division, GPO Box 1694, Sydney, NSW 2001
Level 10, 175 Pitt Street
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For information, please contact our membership division:
membership@taxinstitute.com.au