



THE TAX INSTITUTE



# Membership

*Leading the way in tax*

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# About The Tax Institute

*We are Australia's leading professional organisation in tax, with over 70 years of expertise. We service the profession in its entirety, and represent accountants, tax professionals, lawyers, tax agents, corporations, government, academics and students.*



## Why do we exist?

The Tax Institute was established in 1943 with the aim of improving the position of tax agents, tax lawyers and tax administrators. Since that time Australia's tax system has grown in terms of its dimensions and complexity, and the Institute has evolved accordingly.

Today we are known, throughout the tax profession and beyond, for our influence, intellectual rigour, values, friendships and altruistic sharing of knowledge.

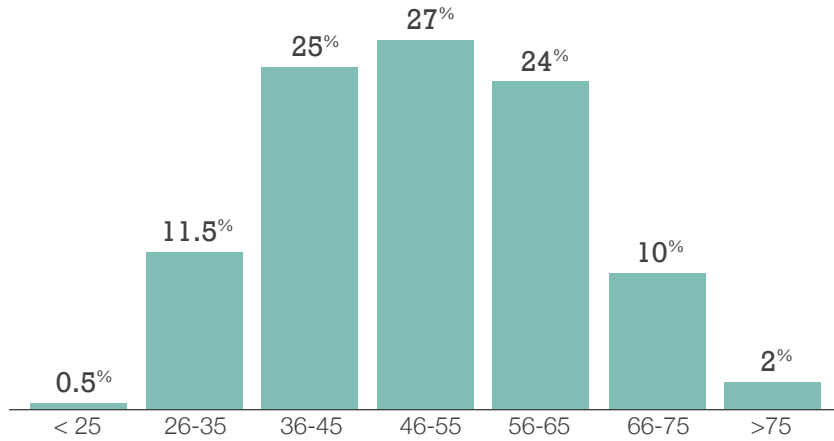
## Who are our members?

We specialise in tax. Our members come from all areas of the tax profession and include accountants, tax agents, lawyers, corporate tax advisers, public servants and academics.

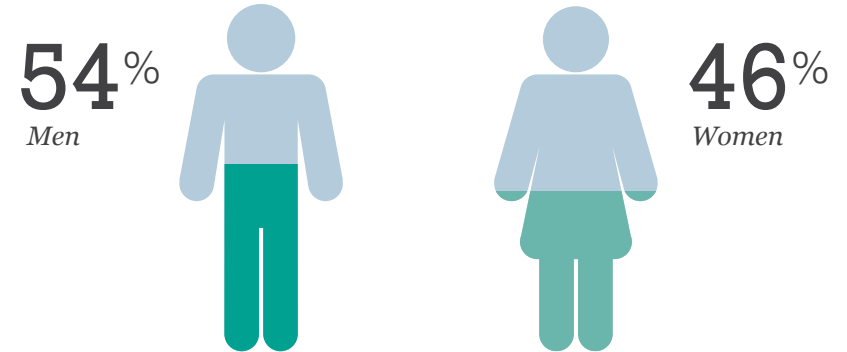
## Why choose The Tax Institute?

Tax law is constantly changing, with disruption comes tax implications and knowledge is power. We are the only organisation committed to improving the knowledge and development of tax professionals. If you specialise in tax, or tax is an important part of your role then you need to be a member of The Tax Institute.

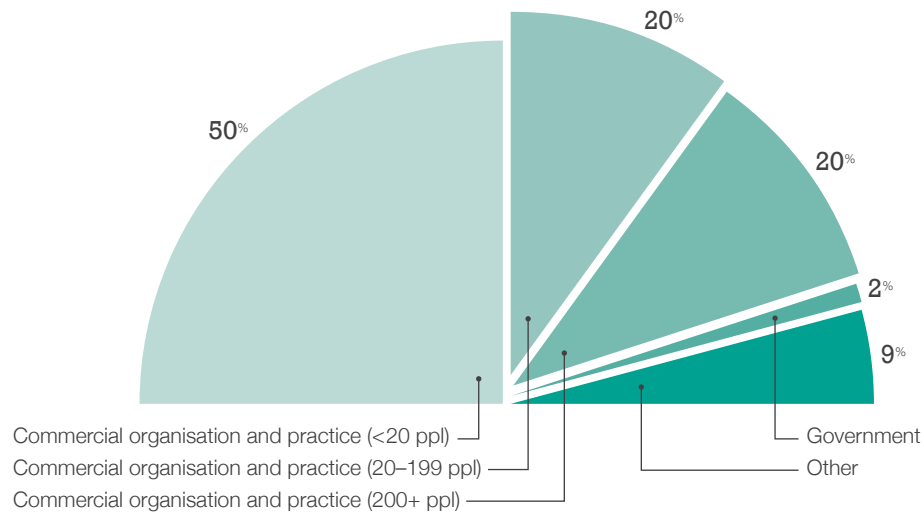
## Membership by age\*



## New members by gender\*

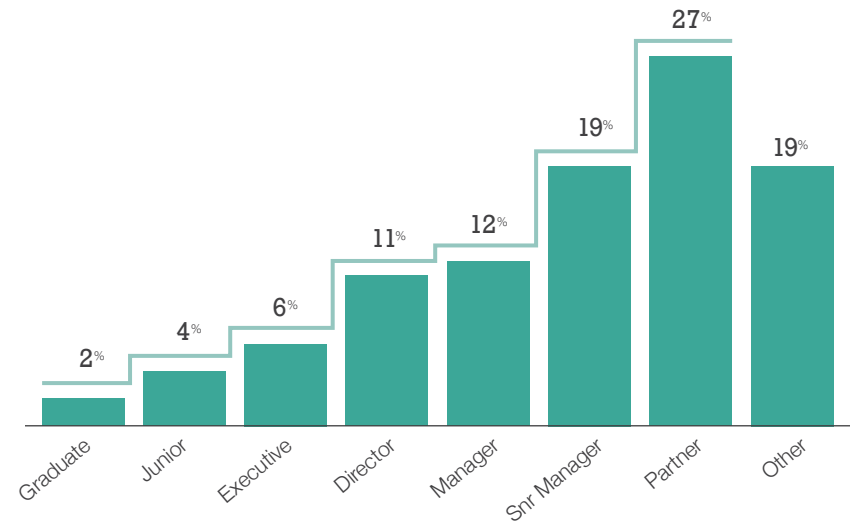


## Size of organisation our members work at\*



\* These statistics are a representation of our National membership.

## Stage in career\*



# Benefits of membership

## Why members join The Tax Institute



**80%**  
*to be kept up-to-date with the constantly changing tax environment*

**68%**  
*to get the information to enhance their performance as a tax professional*

**48%**  
*to gain professional recognition and credibility*

**43%**  
*to be part of an organisation that influences the quality and effectiveness of tax practices*

**42%**  
*to contribute to the improvement of the tax profession*



# Staying up-to-date

**It's easy to stay up-to-date with topical tax issues and changes in the tax landscape, with regular information from our leading experts through:**

## **Taxation in Australia journal**

The Taxation in Australia journal is Australia's leading tax journal with up to-date practical information on the latest tax issues making it invaluable to any tax professional. With 11 publications a year, members will receive the latest versions in hard copy, with the current and past issues also available online. Back issues are also available online for members.

## **TaxVine eNewsletter**

Delivered to members weekly, TaxVine provides members with information on current issues affecting them as well as updating members on our Tax Policy and Advocacy activities. It also offers a unique opportunity for members to express their views on these issues.

## **Monthly technical paper**

As well as discounted access to all of our published papers, our members get access to a complimentary recently published technical paper selected by our team every month. This paper provides relevant up-to-date technical information on a current issue for tax professionals.

## **Annual tax rates table**

A comprehensive downloadable tax rates table is available for all members and updated annually. This table provides easy access to the latest rates, dates and other important tax information.

**Join today at [membership.taxinstitute.com.au/join](https://membership.taxinstitute.com.au/join) or call 1300 829 338**





# Maximise your knowledge

A membership to the Institute gives you the opportunity to maximise your tax knowledge through:

## TaxLine personal research service

Members of The Tax Institute have access to this complimentary research service. Our expert team is available to respond to your requests with access to one of the largest collections of Australian and international tax materials.

## Professional development events

All of our topical events are developed and presented by dedicated senior members of the tax profession to ensure they are relevant and practical and in tune with the needs of the profession. Our events provide practical outcomes on important issues in tax, as well as opportunities to connect with like-minded professionals.

## Discounts on The Tax Institute products

We have developed a suite of highly valuable products which range from The Tax Specialist journal which features in-depth analysis, opinion and argument on legislative, administrative and judicial issues, to our Tax Knowledge eXchange with over 65,000 fully searchable tax commentary, papers and presentations, journal articles, daily news, and more. Members are given preferential rates on subscriptions to these products and more.

## Accredited education programs

Members get access to our highly regarded and accredited education programs and subjects, helping them achieve their full career potential. Our programs have been developed to provide you with a specific professional outcome. Whether you want to complete a recognised postgraduate qualification, become a Chartered Tax Adviser (CTA) or complete an education program approved by the Tax Practitioners Board (TPB) you can do so by studying with The Tax Institute.

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**92%**

*of members have interest in our advocacy work*

**68%**

*of members would consider future study with us*

**58%**

*of members attended an event in the last 3 years*

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A man in a dark suit, white shirt, and striped tie is smiling. He is positioned in the lower-left foreground. Behind him is a large window with a view of a city skyline, including a prominent skyscraper. The window frame is visible, and the background is slightly blurred.

“

*I was interested and wanted to get in on the action, even though at that time I didn't fully appreciate what tax law actually was.*

Matthew Andruchowycz

## Case study: The rise of a tax star

In 2014, The Tax Institute's Tax Adviser of the Year Awards recognised Matthew Andruchowycz as the Emerging Tax Star for that year. At the time, Matthew was a Senior Associate at Wallmans Lawyers in Adelaide. According to the judges, he demonstrated an ability to work on complex matters at a level significantly beyond the level expected of a tax professional with fewer than five years' experience.

Fast forward to today and Matthew is already an accomplished senior tax professional. As a Principal at DMAW Lawyers, he works with accountants, financial planners, bankers, business owners and high net worth individuals on a range of intricate taxation and superannuation matters.

### Choosing tax as a career

We asked Matthew about the factors that initially led him to pursue a career in tax. He told us he had always been a “numbers person” and that, as a young member of Wallmans' general commercial team, he had been fascinated by the work and attitude of the specialist tax lawyers.

“I thought they were impressive,” he said. “They just seemed very focused, hard-working and busy. They stayed a bit longer after hours. They always seemed to be flat-out, walking around the office a bit faster than everyone else. “I was interested and wanted to get in on the action, even though at that time I didn't fully appreciate what tax law actually was.”

### The Emerging Tax Star award

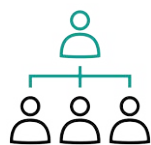
Winning The Tax Institute's Emerging Tax Star award in 2014 was an enjoyable experience for Matthew. In fact, he still considers it one of his career highlights. “I received amazing encouragement on the night of the presentation and afterwards,” he said. “Receiving the award made me feel very positive about my chosen career and the idea that I would likely choose to keep doing it for 30 more years.”

The award has also helped to boost Matthew's professional reputation over the two and a half years since. “A couple of times I've overheard business referrers talking to their clients about the award,” he said. “I've actually heard them say ‘That's Matt, he won The Tax Institute's Emerging Tax Star Award’. They're using it as part of their sales pitch on my behalf. It's happened a few times.”

### Membership of The Tax Institute

Matthew joined The Tax Institute in 2010. In his time as a member, Matthew has participated in various professional development events, and now volunteers on a number of Institute committees. Matthew subscribes to Tax Knowledge Exchange and cites the Institute as extremely important in helping him in his career.

Join today at [membership.taxinstitute.com.au/join](https://membership.taxinstitute.com.au/join) or call 1300 829 338



# Enhance your professional status

Our members are recognised as being knowledgeable, up-to-date and committed tax professionals who can make the best decisions for their clients and their business.

## Use of highly regarded post-nominals

Associate Members (ATI), Fellow Members (FTI) and Chartered Tax Advisers (CTA) can use the highly regarded post-nominals to distinguish themselves in the profession. By using the post-nominals members are showing their commitment to continued professional development and are setting the standard for tax professionals in Australia.



THE TAX INSTITUTE  
ASSOCIATE



THE TAX INSTITUTE  
FELLOW



THE TAX INSTITUTE  
CHARTERED TAX  
ADVISER

## Internationally recognised Chartered Tax Adviser (CTA) designation

The Chartered Tax Adviser designation is an internationally recognised and respected mark of technical excellence and professional integrity, representing the pinnacle of the profession. The post-nominals CTA, represent the highest standards for tax professionals who have extensive experience and a commitment to being at the forefront of the profession. Those carrying this designation have proved themselves to be of the highest calibre and equipped to provide the best tax advice.



# Connect with like-minded professionals

With over 12,000 members, you are joining Australia's largest network of tax agents, accountants, lawyers, tax advisers and practitioners.

## Discussion groups

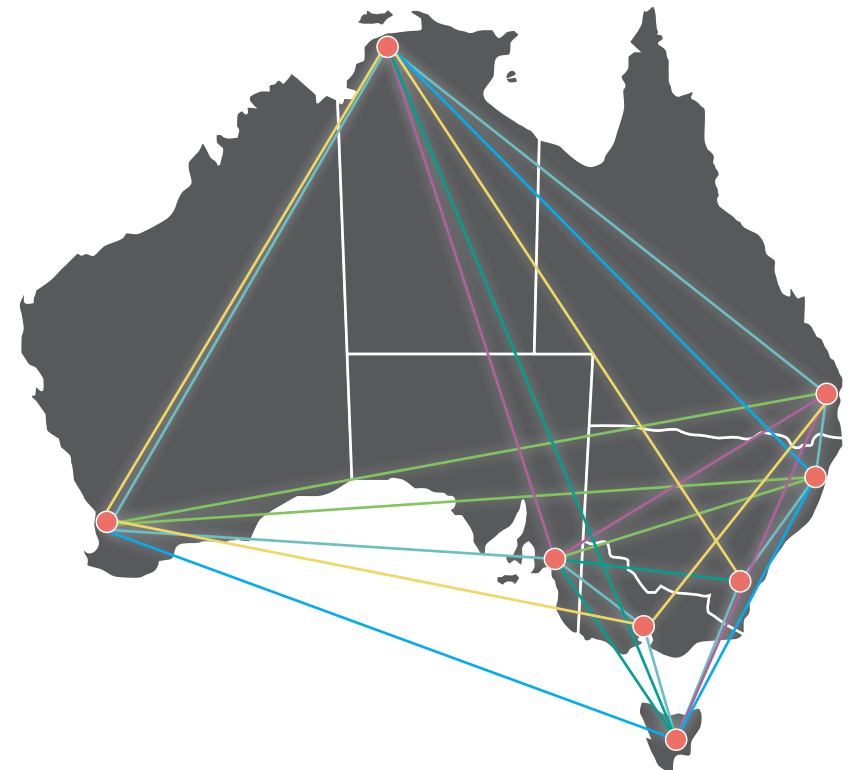
Members can join one of our discussion groups where you can discuss the latest tax topics with other professionals. These groups are a great way to network and gain peer to peer learning.

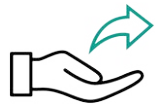
## Social media

Connect with other members through our social media channels. You can like our Facebook page, follow our LinkedIn page and follow us on Twitter and join the conversation.

## Networking

Our events provide excellent networking opportunities with the breaks specifically designed to encourage peer to peer interaction.





# Contribute to the tax profession

Many of our members find contributing back to the profession rewarding and a great way to continue learning and make the most of their membership.

## Input Into Policy Submissions and Tax Policy Matters

The Tax Institute is the most respected and influential contributor to the development of tax policy and administration in Australia. As part of this contribution, we prepare top level submissions on tax policy, administration and technical matters at both Federal and State levels. On certain issues members get the opportunity to provide feedback and input into these submissions. Members also get the opportunity to input to Institute policy matters through the weekly TaxVine eNewsletter.

## Volunteering and contribution

Many members find volunteering a great way to keep their finger on the pulse, raise their profile and give back to the profession. Volunteering can be done in a number of areas by contributing as a presenter at events, writing journal articles or representation in our committees and councils.



# Access a range of benefits

Members get access to products, services and offers specifically developed for their ever changing needs.

## Special offers through our Business Alliance Program

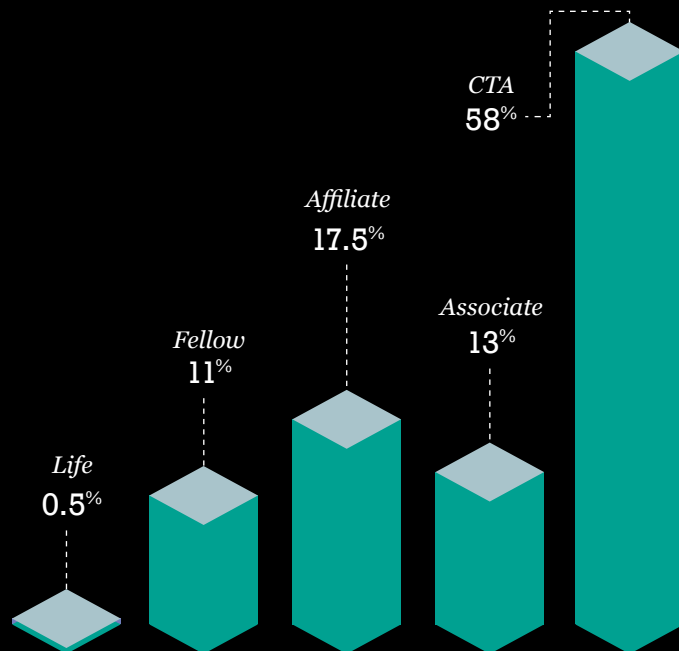
The Business Alliance Program has been developed to provide relevant offers from our partners to our members. Our partners provide services in a diverse range of areas including publishing, banking, insurance and wealth management, business software and business services.

## Career support

Our Careers in tax blog provides information directly relating to growing your career. The articles are written for tax practitioners and cover issues from education through to interview techniques.

# Types of membership

Membership by grade %



# Voting vs non-voting membership

**Membership to The Tax Institute is open to anyone who, through the course of their profession have interest in the issues in taxation. There are two types of membership, voting and non-voting.**

## Voting membership

Voting members are entitled to vote on issues of The Tax Institute and is the required level of membership to satisfy the requirements to register as a tax agent with the Tax Practitioners Board. As a voting member you can display your post-nominals as a commitment to Continued Professional Development. There are three categories of voting membership.

### Chartered Tax Advisor (CTA)

The Chartered Tax Adviser designation is an internationally recognised and respected mark of technical excellence and professional integrity and represents the pinnacle of the profession. Members who become a Chartered Tax Advisor can use the internationally recognised post-nominal CTA.

Chartered Tax Advisers are required to complete a minimum of 30 hours structured tax related CPD per annum.

### Fellow (FTI)

Membership as a Fellow is for experienced, qualified tax professionals. Members who become a Fellow can use the post-nominal FTI.

Fellow Members are required to complete a minimum of 30 hours tax related CPD per annum made up of 50% unstructured (15 hours) and 50% structured (15 hours).

### Associate (ATI)

Membership as an Associate is for qualified tax professionals or other professionals with relevant tax experience. Members who become an Associate can use the post-nominal ATI.

Associate Members are required to complete a minimum of 30 hours tax related CPD per annum made up of 50% unstructured (15 hours) and 50% structured (15 hours).

## Non-voting membership

Non-voting members get the benefits of membership and are not required to meet any Continued Professional Development obligations. As there is no commitment to CPD. There is one category of non-voting membership.

### Affiliate

Membership as an Affiliate is for those involved in taxation who do not meet the requirements of voting membership, or who do not wish to participate in CPD.

# Requirements of membership

**Below are the requirements to be approved as a member of The Tax Institute. To maintain your CTA, Fellow or Associate Membership there is a Continued Professional Development requirement. All members must be of good fame, integrity and character.**

## Voting Members

### Core voting member criteria

To be eligible as a voting member you must satisfy one or more of the following criteria:

- 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.

### Chartered Tax Adviser

Meets the core voting membership criteria (as stated above); and

- Meets the Fellow membership criteria (as stated below); and
- Has successfully passed The Tax Institute's CTA3 Advisory Exam assessment.

### Fellow

Meets the core voting membership criteria (as stated above); and

- Has a minimum of 3 years' relevant tax experience; and
- Satisfies one or more of the following criteria:
  - 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 register or;
  - Has been awarded a Master of Tax or an equivalent Masters qualification from The Tax Institute accredited Australian tertiary institution register.

### Associate

Meets the core voting membership criteria (as stated above); and

- Has a minimum of 1 year's relevant tax experience; and
- Meets either i. or ii. below:
  - i. Satisfies one or more of the following criteria:
    - Has successfully passed The Tax Institute's CTA1 Foundations or an equivalent from The Tax Institute accredited education provider register or;
    - Is a member of ICAA, CPA, IPA, Barrister or Solicitor; or
    - Is a voting member of another Registered Tax Agent Association (RTAA); or
  - ii. Has a minimum of eight years fulltime experience in providing tax agent services in the past 10 years

# Requirements of membership continued

## Non-voting Members

### Affiliate

To be eligible as an Affiliate Member you must satisfy one or more of the following criteria:

- Has successfully passed The Tax Institute's CTA1 Foundations or an equivalent qualification from an Institute accredited education provider; or
- Would otherwise qualify for admission as an Associate member but does not have any relevant Australian experience; or
- Is enrolled in The Tax Institute's CTA2A Advanced course; or
- Is employed by the commonwealth or state revenue authority engaged in taxation practice or administration; or
- Has an interest in the affairs of The Tax Institute who National Council resolves to admit as an Affiliate.

# Chartered Tax Adviser Program

The Chartered Tax Adviser (CTA) designation is the world's number one tax credential, in Australia it's bestowed to tax professionals who successfully complete The Tax Institute's CTA3 Advisory Exam, as part of the Chartered Tax Adviser Program.

Written, presented and assessed by leading, practising tax experts, the program has a tiered structure – from CTA1 Foundations, through CTA2A and CTA2B Advanced, and finally the CTA3 Advisory component – to educate every level of tax professional, from entry level to seasoned leader.

All the topics are relevant and immediately applicable to the workplace, so you'll be equipped with the skills to make your mark: as a leading tax professional, both in Australia and internationally.

## You'll learn:

- ▶ the key tax compliance requirements, principles and processes
- ▶ how to manage complex tax compliance affairs and planning issues
- ▶ tax planning and advisory skills across different tax specialisations.

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**The Chartered Tax Adviser Program can help you launch your career or cement your existing role.**

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Join today at [membership.taxinstitute.com.au/join](https://membership.taxinstitute.com.au/join) or call 1300 829 338



“ *The CTA1 balances technical material and practical application, bridging academia with the practice of tax law.* ”

Rachel Vijayaraj, ATI, Associate – Brown Wright Stein Lawyers




“ *The broad topic areas covered by the program provided me with technical knowledge on many areas of tax which I could apply to real life situations.* ”

Geoff Tierney, CTA – ESV Chartered Accountants


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## *Join the conversation*

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