

MEMBERSHIP APPLICATION FORM

This form is to be used for applying for membership of The Tax Institute, as a Fellow, Associate or Affiliate member.

How to apply

Steps to complete application

Step 1 – Complete this form in full.
Step 2 – Attach documents to prove your eligibility criteria and experience.
Step 3 – Return form and documentation to The Tax Institute.

 **Mail**
GPO Box 1694
Sydney, NSW 2001

 **Email**
membership@taxinstitute.com.au

 **Fax**
02 8223 0077

Personal information

Title: (Mr/Mrs/Miss/Ms/Other) _____

First name: _____

Last name: _____

Date of birth: (DD/MM/YYYY) _____

Have you ever been convicted of a criminal offence, been subject to disciplinary action by a statutory, professional or other body, or are you currently subject to a notice not to manage a corporation as provided in section 600 of the Corporations Law?

Yes No If you answered "Yes" to this question, please attach details.

I confirm I am a person of good fame, integrity and character.

Yes No

Your contact details

Company: _____

Position: _____

Website: _____

Email: _____

Alternate email: _____

Business street address: (inc level) _____

Suburb: _____

State: _____ Postcode: _____

Country: (if outside Australia) _____

Business tel: _____

Business fax: _____

Preferred contact mailing address: Business street

Preferred phone contact: Business

Preferred method of contact: Email

Business postal address: (if not different to business street address) _____

Suburb: _____

State: _____ Postcode: _____

Country: (if outside Australia) _____

Home address: _____

Suburb: _____

State: _____ Postcode: _____

Country: (if outside Australia) _____

Mobile: _____

Home tel: _____

Home fax: _____

Business postal Home

Mobile Home

Both email and mail

Membership eligibility criteria

I have attached copies of relevant documents that prove my eligibility and experience (compulsory for Fellow & Associate applicants).

Each Fellow or Associate voting member must meet one of the following: (please tick all that apply)

Degree or post-graduate degree from an Australian tertiary institution or an equivalent institution in the discipline of accounting 210(a) TASA 2009; or

Diploma or higher award from a registered training organisation or an equivalent institution in the **discipline of accountancy** 210(b) TASA 2009; or

Academic qualifications required to be an **Australian legal practitioner** 210(c) TASA 2009; 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 210(d) TASA 2009; or

Equivalent of 8 years of full-time experience in providing tax agent services in the past 10 years 210(e) TASA 2009.

Fellow (voting member)

- Meet one of the Membership Criteria (see left column); and
- Has passed The Tax Institute's Advanced Tax assessment; and
 - Minimum 5 years relevant tax experience.

Associate (voting member)

- Meet one of the Membership Criteria; (see left column); and
- I satisfy one of the following:
 - Passed The Tax Institute's Applied Tax assessment; or
 - Minimum 3 years relevant tax experience.

Affiliate (non-voting member)

- I satisfy one of the following:
- Passed The Tax Institute's Foundation Tax assessment; or
 - Do not have 3 years of relevant tax experience but would otherwise qualify for admission as an Associate member; or
 - Enrolled in The Tax Institute's Applied Tax course; or
 - An interest in the affairs of The Tax Institute who National Council resolves to admit as an Affiliate member.



THE TAX INSTITUTE

Recognised tax agent association criteria – this information is required to be collected by The Tax Institute under the tax agents services legislation for recognised tax agents services association purposes.

1. What is your tax agent status?

- Registered tax agent Nominee of a registered tax agent

Tax agent number: _____

Expiry date: _____

2. Qualifications relevant to being a tax agent.

Do you have an Accountancy degree, diploma or higher award?

- Yes No

Name of accountancy award: _____

Name of institution: _____

Country degree completed if outside Australia: _____

Year completed: _____

3. Do you have the qualifications to be admitted as an Australian legal practitioner?

- Yes No

Name of legal qualification: _____

Name of institution: _____

Country degree completed if outside Australia: _____

Year completed: _____

4. If you are admitted as an Australian legal practitioner:

Name of legal qualification: _____

Year of admission to legal practice: _____

State of registration: _____

Profile Information

5. Highest level of education:

- | | |
|--|--|
| <input type="checkbox"/> Bachelor degree | <input type="checkbox"/> Masters degree |
| <input type="checkbox"/> Certificate III/IV | <input type="checkbox"/> Post graduate certificate/
Diploma |
| <input type="checkbox"/> Diploma/Advanced diploma | <input type="checkbox"/> School certificate |
| <input type="checkbox"/> Doctoral degree | |
| <input type="checkbox"/> Higher school certificate | |

University of Institution where highest qualification gained: _____

Name of highest qualification: _____

Year of highest qualification: _____

6. Primary field of occupation: (select ONE only)

- | | |
|--|---|
| <input type="checkbox"/> Student – Undergraduate | <input type="checkbox"/> Government |
| <input type="checkbox"/> Student – Postgraduate | <input type="checkbox"/> HR manager |
| <input type="checkbox"/> Teacher/lecturer/academic | <input type="checkbox"/> Lawyer/solicitor/barrister |
| <input type="checkbox"/> Accountant | <input type="checkbox"/> Librarian |
| <input type="checkbox"/> Administrator | <input type="checkbox"/> Recruitment |
| <input type="checkbox"/> Bookkeeper | <input type="checkbox"/> Tax agent |
| <input type="checkbox"/> Chief Financial Officer | <input type="checkbox"/> Training manager |
| <input type="checkbox"/> Consultant | <input type="checkbox"/> Semi-retired |
| <input type="checkbox"/> Corporate tax advisor | <input type="checkbox"/> Retired |
| <input type="checkbox"/> Financial controller | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Financial planner | |

7. Secondary field of occupation: (select ALL that apply)

- | | |
|--|---|
| <input type="checkbox"/> Student – Undergraduate | <input type="checkbox"/> Government |
| <input type="checkbox"/> Student – Postgraduate | <input type="checkbox"/> HR manager |
| <input type="checkbox"/> Teacher/lecturer/academic | <input type="checkbox"/> Lawyer/solicitor/barrister |
| <input type="checkbox"/> Accountant | <input type="checkbox"/> Librarian |
| <input type="checkbox"/> Administrator | <input type="checkbox"/> Recruitment |
| <input type="checkbox"/> Bookkeeper | <input type="checkbox"/> Tax agent |
| <input type="checkbox"/> Chief Financial Officer | <input type="checkbox"/> Training manager |
| <input type="checkbox"/> Consultant | <input type="checkbox"/> Semi-retired |
| <input type="checkbox"/> Corporate tax advisor | <input type="checkbox"/> Retired |
| <input type="checkbox"/> Financial controller | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Financial planner | |

8. Main area of work – primary focus or specialty area: (select ONE only)

- | | |
|---|--|
| <input type="checkbox"/> Audit | <input type="checkbox"/> Inhouse tax counsel |
| <input type="checkbox"/> Capital gains tax | <input type="checkbox"/> International tax |
| <input type="checkbox"/> Compliance | <input type="checkbox"/> Stamp duty |
| <input type="checkbox"/> Corporate tax advisory | <input type="checkbox"/> State taxes |
| <input type="checkbox"/> Customs & excise | <input type="checkbox"/> Superannuation |
| <input type="checkbox"/> Employment taxes | <input type="checkbox"/> Tax accountant |
| <input type="checkbox"/> Fringe benefits tax | <input type="checkbox"/> Transfer pricing |
| <input type="checkbox"/> General tax advice | <input type="checkbox"/> Trusts |
| <input type="checkbox"/> Goods & services tax | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Income tax | |

9. Years of experience working in taxation: (select ONE only)

- | | |
|------------------------------------|--------------------------------------|
| <input type="checkbox"/> 0 years | <input type="checkbox"/> 7-10 years |
| <input type="checkbox"/> 1 year | <input type="checkbox"/> 11-20 years |
| <input type="checkbox"/> 2-3 years | <input type="checkbox"/> 21+ years |
| <input type="checkbox"/> 4-6 years | |

10 Your type of organisation: (select ONE only)

- | | |
|--------------------------------------|--|
| <input type="checkbox"/> Corporation | <input type="checkbox"/> Accounting firm (Go to Question 12) |
| <input type="checkbox"/> Government | <input type="checkbox"/> Legal firm |
| | <input type="checkbox"/> Other _____ |

11. If currently within the internal tax/accounting/legal area of a corporation – your firm's industry: (select ONE only)

- | | |
|---|--|
| <input type="checkbox"/> Banking & finance – retail | <input type="checkbox"/> Manufacturing |
| <input type="checkbox"/> Building & construction | <input type="checkbox"/> Media |
| <input type="checkbox"/> Education & training | <input type="checkbox"/> Mining |
| <input type="checkbox"/> Energy | <input type="checkbox"/> Retail |
| <input type="checkbox"/> Engineering | <input type="checkbox"/> Superannuation |
| <input type="checkbox"/> Entertainment | <input type="checkbox"/> Telecommunications |
| <input type="checkbox"/> Financial services | <input type="checkbox"/> Transport & logistics |
| <input type="checkbox"/> Healthcare | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Information technology (Go to Question 14) | |

12. If you work in public practice – your firm size: (select ONE only)

- | | |
|--|--|
| <input type="checkbox"/> Sole practitioner | Employee of firm with: |
| Partner of firm with: | <input type="checkbox"/> Sole practitioner |
| <input type="checkbox"/> 1-10 partners | <input type="checkbox"/> 1-10 partners |
| <input type="checkbox"/> 11-30 partners | <input type="checkbox"/> 11-30 partners |
| <input type="checkbox"/> 31-50 partners | <input type="checkbox"/> 31-50 partners |
| <input type="checkbox"/> 51-100 partners | <input type="checkbox"/> 51-100 partners |
| <input type="checkbox"/> 101+ partners | <input type="checkbox"/> 101+ partners |

13. Your main client type: (select ALL that apply)

- Individuals – non high net worth
- Individuals – high net worth (\$30 million+)
- Micro business (turnover less than \$2 million)
- Small to medium business (turnover \$2 million - \$100 million)
- Small to medium business (turnover \$100 million - \$250 million)
- Large business/International (turnover \$250 million+)
- Not for profit (including charitable, religious & community services, sporting, associations, educational, hospitals)
- Superannuation – self managed super funds
- Superannuation – other funds
- Government
- Other _____

14. Which of the following staff report to you: (select ALL that apply)

- None
- Administration staff
- Entry level professional staff eg. Graduate, cadet
- Experienced professional staff eg. Accountant, lawyer, tax specialist
- Managers eg. Finance manager, financial controller
- Other _____

15. Membership of other bodies: (select ALL that apply)

- Australian Institute of Company Directors (AICD)
- Australian Institute of Management (AIM)
- Australian Tax Teachers Association (ATTA)
- Bar Association
- Chartered Secretaries Australia (CSA)
- Corporate Tax Association (CTA)
- CPA Australia
- FINSIA
- Financial Planners Association (FPA)
- Institute of Chartered Accountants in Australia (ICAA)
- International Fiscal Association
- Law Society
- National Institute of Accountants (NIA)
- National Tax & Accountants Association (NTAA)
- Tax Payers Australia
- Other _____

16. Taxation related products or services of interest: (select ALL that apply)

- Breakfast clubs
- Business Alliance partners
- Career development
- CPD seminars
- Networking/social events
- Newsletters
- Online resources
- Publications, journals & books
- Residential events/conferences
- Specialist tax education opportunities
- Tax library
- Tax research
- Women in tax
- Young tax practitioner events

17. Areas of speciality or interest: (select ALL that apply)

- Agribusiness
- Arts
- Audit
- Banking & finance
- Building & construction
- Business planning & development
- Business structures
- Capital gains tax
- Charity
- Company secretarial
- Company tax
- Compliance
- Consolidations
- Corporate tax advisory
- Defence
- Dispute resolution & management
- Education
- Film & entertainment
- Financial planning
- Fringe benefits tax
- Goods & services tax
- Health & medicine
- Hospitality
- Income tax
- Industrial relations
- Information technology
- Infrastructure
- Insolvency & reconstruction
- Insurance
- International tax
- Investment advice
- Leasing
- Legal
- Manufacturing
- Media & communication
- Mergers & acquisitions
- Mining, oil & gas (utilities)
- Not for profit
- Payroll tax
- Personal tax
- Primary production
- Property development & real estate
- Registered clubs
- Remuneration planning
- Research & development
- Retail trade & wholesale
- SMEs
- SMSFs
- Stamp duty
- State taxes
- Succession planning, wills, estates & contracts
- Superannuation
- Taxation of financial arrangements (TOFA)
- Training & education
- Trusts
- Other _____

18. Personal Interests: (select ALL that apply)

- AFL
- Basketball
- Books
- Cars
- Cooking
- Cricket
- Fashion
- Fishing
- Film & Literature
- Golf
- Netball
- Professional Magazines
- Rugby League
- Rugby Union
- Sailing
- Soccer
- Swimming
- Tennis
- Theatre
- Travel
- Wine

Privacy

The Tax Institute takes your privacy seriously and is bound by the Federal Privacy Act and the national privacy principles.

All information provided by you is required for a range of purposes including:

- Assessing membership eligibility criteria;
- Ensuring we maintain accurate records on our membership database;
- Providing you with information about member benefits available through the Institute and through our Business Partners;
- Conducting market research to ensure we continue to meet your requirements and provide valued services to our members.

If you do not wish to have your details used by The Tax Institute for any of the above purposes please advise the Institute in writing.

The Tax Institute will contact you via email or direct mail to advise you of various events and professional products and subscriptions that are available to you. Occasionally we will also forward you information about discounts and offers that are available to you through our business partners.

Our business partners provide support to The Tax Institute and enable us to maintain extremely modest membership rates. We do not intend to send you information that is not relevant to you or your profession.

For further information regarding privacy, please visit our website: taxinstitute.com.au.

Marketing exclusions

From time to time the Institute may contact you via email, mail or phone regarding marketing offers for our events, training and information products.

- If you do not wish to receive any marketing related material, please tick this box.

Please note if you chose not to receive marketing offers from the Institute we may still contact you in regards to your membership.

Occasionally, we would also like to forward you information about discounts that are available from our Business Alliance partners.

- If you do not wish to receive any Business Alliance partner material, please tick this box.

2012/2013 Membership fees – Tax Invoice: Payable on application

Fellow and Associate members (voting members)

Membership period	Australian member price	Overseas member price* (inc service fee)	Total
1 July 2012 to 30 June 2013	\$550 (inc \$50.00 GST)	\$570.00	\$
1 October 2012 to 30 June 2013	\$412.50 (inc \$37.50 GST)	\$427.50	\$
1 January 2013 to 30 June 2013	\$275 (inc \$25.00 GST)	\$285.00	\$
1 April 2013 to 30 June 2013	\$137.50 (inc \$12.50 GST)	\$142.50	\$

Membership products	Australian member price	Total
Complimentary certificate (Fellows & Associates only) Fellow and Associate members receive a complimentary personalised membership certificate which exhibits your status as a Tax Institute member (certificate only).	Complimentary for Fellow and Associate members (certificate only)	
Frame your certificate You can proudly display your membership of The Tax Institute with your framed certificate. The Institute has negotiated a competitive price for certificate framing.	\$100.00 inc GST (Includes certificate printing, framing and postage)	\$

Affiliate members (non-voting members)

Membership period	Australian member price	Overseas member price* (inc service fee)	Total
1 July 2012 - 30 June 2013	\$365 (inc \$33.18 GST)	\$401.82	\$
1 October 2012 - 30 June 2013	\$273.75 (inc \$24.89 GST)	\$301.36	\$
1 January 2013 - 30 June 2013	\$182.50 (inc \$16.59 GST)	\$200.91	\$
1 April 2013 - 30 June 2013	\$91.25 (inc \$8.30 GST)	\$100.45	\$

Optional products	Australian member price	Total
The Tax Institute website subscription The Tax Knowledge eXchange is one of Australia's leading online tax databases - it offers you the opportunity to have unlimited access to the very latest tax commentary, journal articles, daily tax news, 15 years worth of industry content online, plus a new option to subscribe to all The Tax Institute's published books online.	\$680.00 (inc \$61.82 GST)	\$618.18
Upgrade your Tax Knowledge eXchange subscription If you include our respected online books with your Tax Knowledge eXchange subscription you also get unlimited access to current and new online books published by The Tax Institute.	\$990.00 (inc \$90.00 GST)	\$900.00
		Total \$

Declaration

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, if my application is successful.

I acknowledge that Fellow and Associate members are required to complete 30 CPD hours each year, of which 15 hours must be structured.

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.

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.

I hereby declare I am a person of good fame, integrity and character

Signature: _____

Date of issue: (Date of signature) / /

Payment method

I enclose a cheque* for \$ _____

*Please make cheque payable to The Tax Institute.

Please charge my credit card \$ _____

Card type:

AMEX Visa MasterCard Diners

Card no. □□□□/□□□□/□□□□/□□□□

Expiry date: _____

Cardholder's signature: _____

Cardholder's name: _____

For further information please contact our Membership Division by email: membership@taxinstitute.com.au or on 02 8223 0060.

*All overseas membership applications include a service fee for postage and handling.
Please note: All prices are subject to change without notice.
Total amount includes GST where applicable (Australian Dollars only)



THE TAX INSTITUTE