

Use this form to apply for Recognition of Prior Learning (RPL) if you have completed studies that are equivalent too ATL007 Advanced Superannuation. An application fee of \$215 applies, this is non-refundable. Refer to taxinstitute.com.au/education for policies and fees. Please retain original copy for your records. HEPCO Pty Ltd trading as The Tax Institute Higher Education. ABN 30 642 863 787.

FORM B | WD

Date of issue: July 2025

1 Candidate information

Candidate ID:

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

First name*: Last name*:

*This will appear on your testamur.

2 Contact information

Please update my details

Personal details:

Home address:

Suburb / City: State: Postcode:

Country:
(if outside Australia)

Email:

Home tel: Mobile:

Employment/Business details:

Company: Position:

Address:

Suburb / City: State: Postcode:

Country:
(if outside Australia)

Bus tel: Bus fax:

3 Evidence table

The Tax Institute Higher Education subject details	The Applicant's subject/s studied
Name of Education Provider The Tax Institute Higher Education	Name of previous Education Provider/s: Is the institution which you completed your studies recognised by the regulator/s and/or accredited? (see tpb.gov.au or training.gov.au or teqsa.gov.au/national-register) <input type="checkbox"/> YES <input type="checkbox"/> NO
Subject Applied for Advanced Superannuation	Subject/s Studied:
Code ATL007	Code:
Credit Point Value 6	Credit Point Value:
Contact Hours 10-15 hours per week	Contact Hours:
Subject Duration 12 weeks	Subject/s Duration, Year of Study:
Assessments <input checked="" type="checkbox"/> Online checkpoint tests <input checked="" type="checkbox"/> Final Exam <input checked="" type="checkbox"/> Assignment	Assessments Completed (highlight relevant): <input type="checkbox"/> Formal exam <input type="checkbox"/> Assignment <input type="checkbox"/> In class exam <input type="checkbox"/> Other:
Is there any relevant experience that has extended the learning of the topic/subject? <input type="checkbox"/> YES (add attachment, see <i>Other Evidence, Section 4 Checklist</i>) <input type="checkbox"/> NO	
LEARNING OUTCOMES from The Tax Institute Higher Education subject modules	LEARNING OUTCOMES Applicant to insert Learning Outcomes from the subject/s studied
ATL007.1 Types of contributions – Superannuation contributions – introduction – Reserve allocations – Self-employed contributions – Contribution ruling – Overseas superannuation transfers – Work test – Personal injury payments – Capital Gains Tax (CGT) Cap	Matched Learning Outcomes:
ATL007.2 Contribution Refund Provisions & Division 293 Tax – Excess concessional contribution refunds – Refund of excess non-concessional contributions – Sustaining the superannuation contribution concession	Matched Learning Outcomes:

LEARNING OUTCOMES from The Tax Institute Higher Education subject modules	LEARNING OUTCOMES Applicant to insert Learning Outcomes from the subject/s studied
ATL007.3 Employer Obligations <ul style="list-style-type: none"> - Reportable employer superannuation contributions - Other contribution issues 	Matched Learning Outcomes:
ATL007.4 Contribution Strategies <ul style="list-style-type: none"> - Dealing with excess contributions - Contribution strategies 	Matched Learning Outcomes:
ATL007.5 Taxation of Superannuation Funds <ul style="list-style-type: none"> - Superannuation contributions - Non-arm's length income (NALI) - Capital gains tax considerations - Non-complying superannuation - Deducting expenses 	Matched Learning Outcomes:
ATL007.6 Exempt Current Pension Income <ul style="list-style-type: none"> - Segregated method - Unsegregated method - Exemption current pension income on death of a member 	Matched Learning Outcomes:
ATL007.7 Investment Provisions <ul style="list-style-type: none"> - Acquisition of assets - Business real property - Limited recourse borrowing arrangements - In-house assets - Collectable and personal-use assets 	Matched Learning Outcomes:

LEARNING OUTCOMES from The Tax Institute Higher Education subject modules	LEARNING OUTCOMES Applicant to insert Learning Outcomes from the subject/s studied
ATL007.8 Benefits on Pre-Retirement and Retirement <ul style="list-style-type: none"> - Access to superannuation - Superannuation interests - Transition to retirement and salary sacrifice - Transfer Balance Cap - Other pension considerations - Accessing superannuation prior to retirement 	Matched Learning Outcomes:
ATL007.9 International Tax Fundamentals <ul style="list-style-type: none"> - Tax on insurance proceeds - Superannuation and estate planning - Payment of superannuation death benefits - Superannuation death benefit arrangements 	Matched Learning Outcomes:

4 Checklist

Compulsory Evidence

- Completed the Evidence Table in Section 3 – if not completed, Application will not be assessed
- Attached certified copies of all relevant Academic Transcripts showing Institutions where study was undertaken
- Attached a Unit / Subject Outline studied at the previous educational institution, subjects and subject codes must match the Subjects and Subjects codes on supplied Academic Transcript
- Evidence of relevant professional experience – copy of your current Résumé

Other Evidence:

- Letter from your employer confirming you have the required relevant Australian tax experience
- Evidence of current membership of a law institute or society, the IPA, CPA, ICAA or a practising certificate
- Evidence of satisfaction of continuing professional development (CPD) requirements

Other:

5 Candidate Declaration

I confirm that I have read and accept The Tax Institute Higher Education's policies and procedures (see taxinstitute.com.au/education for policies and fees), including:

- Enrolment,
- Deferring and Withdrawing,
- Membership, and
- Recognition of Prior Learning

I hereby declare that the information in this application is true and correct.

Full name: (please print)

Signature:

Date of signature:

DD/MM/YYYY

6 Payment

On completion of this form your application will be submitted for processing. Once completed, you will be contacted for payment, or you may submit the "Payment Authorisation Form".

Please complete this form and return by email to taxeducation@taxinstitute.com.au. Please refer to taxinstitute.com.au/education for policies and fees. Please retain original copy for your records. HEPCO Pty Ltd trading as The Tax Institute Higher Education. ABN 30 642 863 787.

FORM WD

1 Contact information

Please update my details

Candidate ID:

Title: Mr Mrs Miss Ms Other (please specify)

First name: Last name:

Company:

Email:

Postal address:

Suburb / City: State: Postcode:

Country:
(if outside Australia)

Phone: Mobile:

Privacy: HEPCO Pty Ltd, trading as The Tax Institute Higher Education (HEPCO), a subsidiary of The Tax Institute ("TTI"), together with TTI collects, uses, holds and discloses personal information in accordance with TTI's Privacy Policy. By submitting your application to HEPCO, 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 in accordance with TTI's Privacy Policy. TTI's Privacy Policy is available at taxinstitute.com.au/about-us/privacy-copyright-disclaimer.

2 Payment method

Please charge \$ to my AMEX Visa MasterCard

Name on card:

Card no.: Expiry date: Cardholder's signature:

For further information please contact us on **1300 829 338** or email taxeducation@taxinstitute.com.au.

To apply

Email taxeducation@taxinstitute.com.au
Mail Level 21, 60 Margaret Street, Sydney NSW 2000
Call 1300 829 338

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