

APPLICATION FOR ADMISSION AS FELLOW

1. Personal Details

(please type or print in block letters)

Title: Mr/Mrs/Miss/Ms

.....
Family Name Given Names

Firm/Company Name

Business Address

.....
State Postcode.....

Phone (.....)..... Fax (.....).....

Email

How would you like your name to be printed on your practising certificate?

.....
First name Second name Family Name

2. NTAA membership number:

To be a Fellow of the NTAA you must also be a member of the association. (**Important:** please refer to item 6 of this application form regarding also becoming a fellow of NTAA+) However, it is possible to apply for membership and Fellowship of the NTAA at the same time. If you are not yet a member of the NTAA there is no need to complete a separate membership application form. Simply tick the box below and we will contact you if we need any additional information to process your membership application.

YES, I also wish to become a member of the NTAA

Please note, membership of the NTAA is a separate subscription to the Fellowship subscription and therefore your payment amount should also include the membership subscription. Membership of the NTAA is \$330.00 per annum.

3. Eligibility for fellowship

There are a number of categories which may qualify you for Fellowship of the NTAA. Only one category needs to be satisfied in order to be a Fellow. Please read through the following categories and complete that which best suits your eligibility.

a. Holder of a relevant practising certificate

Do you hold a current practising certificate with any of the following associations?

- CPA Australia
- Chartered Accountants Australia & New Zealand
- Institute of Public Accountants

Please note, a practising certificate is different from membership of any of the above associations. If you do hold a practising certificate with any of the above bodies, you are automatically entitled to be admitted as a fellow with the National Tax & Accountants' Association Limited once we process your Fellowship subscription payment. You must attach a copy of your practising certificate with this application.

Please proceed to question 4. If you are not eligible for Fellowship under category (3a) please proceed to category (3b).

b. Degree qualified applicant

You may not be eligible under category (3a) but you may be eligible for admission as a Fellow where:

you hold a recognised degree or diploma from a recognised tertiary institution with an accounting major; and

in the preceding three years you have practised or worked full time in a public practice environment, or were employed by or supervised by a person who was “qualified” to be a Fellow.

If you answered “YES” to both of the above questions, please:

Forward a copy of your qualification; and;

Complete the required information regarding your experience in the taxation industry below.

Details of experience in the taxation industry within the last 3 years

Name of Firm	Contact Person	Position Held	Period

If you are or have been an employee please attach letters evidencing your work experience. If you have had more than one employer/supervisor over the three year period, your application should be accompanied by letters from each employer/supervisor in the format below.

I,, acted as the employer/supervisor of the Fellowship applicant for the preceding 3 years and I am qualified to be a Fellow of the NTAA.

Signature:

Date:

The NTAA retains the right to contact the employer to obtain additional information should it be required.

If you are self-employed, please also attach a copy of your tax agent’s certificate.

If you are eligible for Fellowship under category (3b) please proceed to question 4.

If you are not eligible for Fellowship under category (3b) please proceed to category (3c).

c. Broad experience in the taxation industry

You may not be eligible under categories (3a) nor (3b) but you may be eligible for admission as a Fellow where you can show that you have sufficient experience in the tax industry.

Please complete the required information regarding your experience in the taxation industry.

Details of experience in the taxation industry within the last 10 years

Name of Firm	Contact Person	Position Held	Period

If you are or have been an employee, please attach letters evidencing your work experience. If you have had more than one employer over the ten year period, your application should be accompanied by letters from each employer. The NTAA retains the right to contact the employer to obtain additional information should it be required.

If you are self-employed, please also attach a copy of your tax agent’s certificate.

If you are eligible for Fellowship under category (3c) please proceed to question 4. If you are not eligible for Fellowship under category (3c) (or categories 3a and 3b) you are unable to be a Fellow of the NTAA at this stage of your career.

4. Do you have professional indemnity insurance?*

- a. If YES, please attach a copy of your professional indemnity policy, which details the nature and extent of your insurance cover.

PI Insurance renewal date: _____

- b. If NO, you are required to have professional indemnity insurance cover. Please visit the NTAA website, www.ntaa.com.au and a quote can be provided through an on-line service.

5. Other Memberships

- a. Has your membership with another Recognised Tax Agent Association ever been refused, suspended or terminated?

No Yes (Please attach details)

- b. Are you, or have you ever been, subject to disciplinary proceedings by a Recognised Tax Agents Association?

No Yes (Please attach details)

6. Payment details

- a. If you are applying for both membership and Fellowship of the NTAA the payment is \$594.00

- b. If you are only applying for Fellowship of the NTAA the payment is \$264.00

Please note: Your payment will be automatically banked. Should your application for Fellowship be unsuccessful, a refund cheque for \$264.00 will be posted to you.

- c. Payment method

- I enclose a cheque made payable to the NTAA for the amount of \$ _____
- I wish to pay by credit card
- MasterCard Visa

\$ _____

Card No.:

Expiry Date:

Signature:

7. By applying to be a fellow of the NTAA, you are automatically applying to be a Fellow of the National Tax Agents' Association (NTAA+) ACN 111 718 686.

NTAA+ has been set up with a new Constitution specifically designed to comply with the Tax Agent Services Act 2009 so as to be a Recognised Tax Agent Association ('RTAA'). Please note that only 1 fellowship fee is payable.

To be eligible to be a fellow and voting member of NTAA+ you must satisfy one of the requirements set out in the Tax Agent Services Regulations (if you don't meet any of these, you may be a Fellow of NTAA but not NTAA+). The requirements are listed in the attachment to this document. Please tick one of the boxes in that attachment. We may contact you if additional information is needed.

* Please note: H&R Block franchises have suitable cover for the purposes of this application.

8. Declaration for Fellowship application

I hereby apply for admittance to the status of Fellow of the NTAA. I agree to be bound by the NTAA's and NTAA+'s Constitution and By-Laws including the requirements for continuing professional education and professional indemnity insurance.

I understand that:

- a. My Fellowship subscription is an annual subscription and is a separate subscription from my membership subscription of the NTAA.
- b. My renewal notices for membership and Fellowship of the NTAA and NTAA+ are likely to arise on different dates.
- c. A new Practising Certificate will automatically be sent to me every three years.

I declare that all the information provided in this application including the certification is correct. I agree to produce further evidence and information as may be required by the NTAA to be admitted to status of Fellow of the Association and a Fellow of NTAA+ and to receive a Practising Certificate.

Signature of applicant:

Date:

Please forward your application form and all requested documentation by any of the following methods:

- A. Mail:** Member Services Department
NTAA Ltd.
29-33 Palmerston Crescent
South Melbourne 3205 VIC
A payment by cheque or credit card can be made when your application is mailed
- B. Fax:** 1300 306 351
*You may fax the application form and the requested documentation.
We can only accept a credit card payment if you fax your application.*
- C. Email:** ntaainfo@ntaa.com.au
*You may scan the application form and the requested documentation and email it to ntaainfo@ntaa.com.au.
We can only accept a credit card payment if you email your application.*

Privacy Statement

The NTAA understands that you value your privacy and wish to have your personal information kept secure. You can view the full text of our Privacy Policy and Collection Notice on our website (<http://ntaa.com.au/privacy>).

Attachment

Qualification for Membership as a Fellow of NTAA+

A natural person who is at least 18 years of age qualifies to be a Fellow of NTAA+ if the person complies with at least one of the following requirements:

- (a) the person has been awarded a degree or a post-graduate award from:
 - (i) an Australian tertiary institution; or
 - (ii) an equivalent institution;in the discipline of accountancy;
- (b) the person has been awarded a diploma or higher award from:
 - (i) a registered training organisation; or
 - (ii) an equivalent institution;in the discipline of accountancy;
- (c) the person has the academic qualifications required to be an Australian legal practitioner;
- (d) the person was:
 - (i) registered as a tax agent, or as a nominee, for the purposes of Part VIIA of the Income Tax Assessment Act 1936 as in force immediately before the commencement of Schedule 1 to the Tax Agent Services Regulations 2009 (Cth); and
 - (ii) a member of, and entitled to vote at meetings of, a recognised professional association within the meaning of section 251LA of the Income Tax Assessment Act 1936 as in force immediately before the commencement of Schedule 1 to the Tax Agent Services Regulations 2009 (Cth);
- (e) the person has the equivalent of 8 years of full-time experience in providing tax agent services in the past 10 years.