



# APPLICATION FOR ADMISSION AS FELLOW

Please complete all sections in this application

## 1. Personal Details

*(please type or print in block letters)*

Title .....

.....  
Family Name Given Name(s)

Postal Address .....

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

Phone ( ) ..... Mobile .....

Email .....

Please provide how you would like your name to be printed on your practising certificate:

.....  
First name Second name *(if applicable)* Family name

## 2. NTAA Membership

To be a Fellow of the NTAA, you must also be a member of the association.

I am a current NTAA member

Membership Number

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I am not a current NTAA member

*NTAA membership is a separate annual subscription of \$385, in addition to the annual Fellowship subscription of \$319.*

**3. Eligibility for Fellowship**

To be eligible for NTAA Fellowship you must satisfy at least **one** of the following three categories and provide the relevant supporting documentation.

**a. Holder of a relevant practising certificate**

You hold a current Public Practising Certificate (separate from membership) with one of the associations listed below.

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

**Please provide a copy of your current practising certificate with this application.**

**b. Degree qualified applicant with minimum 3 years experience in the tax profession**

- You hold a recognised degree or diploma from a recognised tertiary institution with an accounting major

Education Institute	Tertiary Studies	Year Completed

**Please provide a copy of your qualifications/transcripts.**

- In the preceding three years you have practiced or worked full time in a public practice environment, or were employed/supervised by a person who was 'qualified' to be a Fellow.

**Please provide a letter from each employer/supervisor in the preceding three-year period detailing your work experience.** Refer to attached template on page (3).

**c. Broad experience in the tax profession**

Where you don't qualify under (3a) or (3b), you may still qualify where you can show you have sufficient experience in the tax profession.

Please provide your experience in the tax profession over the last 10 years.

**Please provide letter(s) from each employer/supervisor in the preceding ten-year period detailing your work experience.** Refer to attached template on page (3).

## Application for admission as Fellow

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The template below is designed as a guide for the applicant’s employer to complete to support 3b or 3c.

I, \_\_\_\_\_ acted as a supervisor of \_\_\_\_\_ for the preceding \_\_\_\_ years and I am qualified/not qualified to be a Fellow of the NTAA.

I certify that the Fellowship applicant was employed at \_\_\_\_\_ on a full-time/part-time basis and performed the duties outlined below from the years \_\_\_\_\_ to \_\_\_\_\_.

**A. Duties performed / Experience**

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**B. Number and types of returns**

- **3B applicants** – please provide information from the preceding **3 years**.
- **3C applicants** – please provide information for the preceding **10 years**.

Year	Individual	Partnerships	Trusts	Companies	Other (please stipulate)

Employer/Supervisor signature: \_\_\_\_\_

Employer/Supervisor Phone: \_\_\_\_\_

Employer/Supervisor Email: \_\_\_\_\_

Date: \_\_\_\_\_

**The NTAA retain the right to contact the employer to obtain additional information if required.**

⚠ If the applicant is a **self-employed registered tax agent**, please attach a copy of your individual tax agent’s certificate.

⚠ If the applicant is **self-employed and does not hold an individual tax agent registration** at this time, please complete sections A and B above.

**4. Fellow of the National Tax Agents' Association (NTAA PLUS)**

ACN 111 718 686

NTAA PLUS was set up in 2011 with a Constitution specifically designed to comply with the *Tax Agents Services Act 2009* so as to be a Recognised Tax Agent Association ('RTAA').

For eligibility to be a Fellow of NTAA PLUS and obtain recognised voting rights you must be at least 18 years of age and satisfy **one** of the requirements listed below as set out in the *Tax Agent Services Act 2009* and its regulations.

Please tick the relevant box(es) applicable to you and provide supporting documentation:

- (a) I have 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) I have been awarded a diploma or higher award from:
- (i) A registered training organisation; or
- (ii) An equivalent institution;
- in the discipline of accountancy.
- (c) I have the academic qualifications required to be an Australian legal Practitioner.
- (d) I was/am:
- (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 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) I have the equivalent of 8 years full-time experience in providing tax agent services in the past 10 years.

**5. Professional indemnity (PI) insurance**

All Fellows of NTAA and NTAA PLUS must hold PI insurance. The minimum aggregate amount of PI cover must meet the Tax Practitioner Board's requirements. For further information refer to [www.ntaa.com.au/the-ntaa/ntaa-](http://www.ntaa.com.au/the-ntaa/ntaa-).

- I am covered under a personal PI insurance policy
- I am covered under my employer's PI insurance policy

**Details of PI Insurance Policy**

Insurer ..... Cover amount ..... \$ .....

Policy Period ..... / ..... / ..... to ..... / ..... / .....

Please provide a copy of your policy schedule and certificate of currency.

- I need to arrange PI insurance

*Please visit NTAA's Insurance Solutions: [www.nis.ntaa.com.au](http://www.nis.ntaa.com.au) for further information.*

**6. Other Memberships**

- a. Has your membership with another Professional 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 Professional Association?

No  Yes  *(please attach details)*

**7. Payment details**

- I'm applying for both NTAA membership and NTAA Fellowship **\$ 704.00**
- I'm applying for NTAA Fellowship **only** as I am already an NTAA member **\$ 319.00**

**Payment authority**

- I wish to pay by credit card for the amount of \$ .....

Mastercard  Visa  American Express

Name on Card .....

Card Number .....

Expiry Date ..... / .....

Signature .....

OR

- I enclose a cheque made payable to NTAA for the amount of \$ .....

**8. Declaration**

I declare that:

- All information and attachments provided in this application are correct and true.
- I hereby apply for admittance to the status of Fellow of the NTAA.
- I hereby apply for admittance to the status of Fellow of the NTAA PLUS.
- I agree to produce further evidence and information as may be requested by the NTAA to establish my eligibility to the status of Fellow.
- I agree to abide with the NTAA and where applicable NTAA PLUS Constitutions and By-Laws.
- I agree to undertake the minimum Continuing Professional Development/Education as required by the NTAA, and where applicable NTAA PLUS.
- I agree to maintain my PI insurance in accordance with the minimum aggregate amount of cover required.
- I understand my Fellowship subscription is an annual subscription and is a separate subscription from my membership subscription.
- I understand my renewal notices for NTAA membership and Fellowship may arise on different dates.
- I understand a new practising certificate will be issued to me every 3 years whilst my Fellowship membership remains current.

Signature of applicant: .....

Date: ...../...../.....

**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>).

**Checklist**

	All sections have been completed on this application
	All relevant supporting materials are attached to support section 3
	All relevant supporting documentation is attached to support section 4 (if applicable)
	All relevant supporting documentation is attached to support section 6 (if applicable)
	Professional Indemnity policy schedule/certificate of currency is attached

**Submit your application**

- A. Mail** Fellowship Co-ordinator  
National Tax & Accountants Pty Ltd  
29-33 Palmerston Crescent  
South Melbourne VIC 3205
- B. Email** [ntaainfo@ntaa.com.au](mailto:ntaainfo@ntaa.com.au)
- C. Fax** 1300 306 351