

Application for ACCA membership



REGISTRATION NUMBER

In order to meet ACCA's membership requirements you must have:

- Completed the ACCA Qualification exams.
- Demonstrated effectiveness and achievement in the workplace by meeting ACCA's performance objectives having had your work overseen and agreed by a workplace mentor/training supervisor.
- Achieved 36 months of relevant supervised experience.
- Completed the Professional Ethics module (if you registered for the ACCA Qualification from 1 January 2007). If you registered before 1 January 2007, you will have transferred over to the ACCA Qualification and will not be required to complete the Professional Ethics module. However, ACCA strongly recommends that you do.

ACCA will already hold information relating to your eligibility for membership providing that you have correctly completed your Practical Experience Requirement (PER) annual return. You can update your PER annual return via *myACCA*.

- Please indicate here if you have completed all or your most recent experience for membership with a Gold or Platinum level ACCA Approved Employer – trainee development. Please provide details of your employer below including the name of the ACCA Approved Employer primary contact* or your workplace mentor. The ACCA Approved Employer primary contact or your workplace mentor will receive an email requesting confirmation of your eligibility to claim exemption from completing the TDM. If you cannot provide an email address for your ACCA Approved Employer primary contact or your workplace mentor, please provide a letter from them confirming your employment and that they consent to you claiming the TDM exemption.

*this is the person nominated by your employer to be the main point of contact for all matters concerning its ACCA Approved Employer status (formerly referred to as the scheme manager)".

▼ Approved Employer name / registration number

▼ ACCA Approved Employer primary contact or workplace mentor name

▼ ACCA Approved Employer primary contact or workplace mentor email address

- Please indicate here if you have recorded your experience using a TDM booklet.
- Please indicate here if any of your practical experience has been achieved in a lecturing role.
- Please indicate here if any of your practical experience has been achieved in a part-time role.
- Please indicate here if you completed Hong Kong Institute of Certified Public Accountants PER requirements.

COMMUNICATIONS AND MARKETING

This section sets out certain information and options on how ACCA may communicate with you, the types of materials which ACCA may send to you and the extent to which ACCA will discuss your details with certain third parties. By signing the declaration, you give consent to ACCA using your data for the purposes and in the manner indicated in this section, except to the extent you opt out below or by logging into myACCA.

Communications method – ACCA may communicate with you by email, phone or by post using the contact details provided on this form or otherwise provided by you. Email is ACCA's preferred method of sending general correspondence, publications and promotional information.

ACCA promotional material – In order to get the maximum benefit out of your membership, ACCA may send you promotional materials relating to ACCA services and events.

ACCA support – ACCA often communicates with employers to discuss membership improvements and ways in which ACCA can provide enhanced support towards CPD. When communicating with employers it is often helpful to provide a list of name of the ACCA contact who are working in that company.

Third party marketing material – ACCA would like to keep you informed of products and services from third party organisations that may be of interest, relevance or benefit to you in your professional capacity. All are strictly vetted and the mailing/email list is never given directly to the advertising party. All campaigns are carried out by ACCA or an ACCA approved agency.

I do not wish to receive third party marketing materials.

Data protection

ACCA may use your personal data (provided on this form or otherwise collected during the course of your relationship with ACCA) in order to;

- administer your application and subsequent ACCA membership
- administer and monitor your exams, courses and experience (if applicable)
- send you publications and other communications (produced by ACCA)
- respond to enquiries and investigate complaints
- comply with ACCA's regulatory obligations.

For more information in how we collect and use your personal data, please refer to our data protection notice, available at www.accaglobal.com/documents/protection_notice.pdf or alternatively contact ACCA using the details noted on this form

Email address

Your email address will be used for outbound emails. It must be unique to you and not shared. It is your responsibility to ensure that your email address is correct. ACCA will not accept responsibility for emails being sent to email addresses which are no longer used, which are incorrectly formatted, or which are publicly available.

Email

A member in the UK or Ireland will normally be enrolled with the district society covering his/her residential address, which will involve receiving mailings directly from that society. If you do NOT wish to be enrolled, tick here:

A member in the United Kingdom or Ireland will normally be enrolled with the members' network covering his/her employment category, which will involve receiving mailings directly from that network. If you do NOT wish to be enrolled, tick here:

Upon admission to membership you will automatically receive a copy of the *ACCA Rulebook* in CD-ROM format. This is also available online at www.accaglobal.com/members/professional_standards/ethics/rulebook

MEMBERS' NETWORK

A member in the UK or Ireland will normally be enrolled with the regional members' network covering his/her residential address, which will involve receiving mailings directly from that network.

If you do not wish to be enrolled, please cross here.

A member in the UK or Ireland will normally be enrolled with the employment based members' network covering his/her employment category, which will involve receiving mailings directly from that network.

If you do not wish to be enrolled, please cross here.

EMPLOYMENT CATEGORY

Which best describes your organisation?

- National organisation Presence in 2–10 countries Multinational organisation

PUBLIC PRACTICE

- Please indicate here if you work in public practice.
 Please indicate here if you sign or produce any accounts or report or certificate or tax return concerning any persons/organisations financial affairs that may be relied upon by a third party.

Nature of firm

If all of the partners/directors are members of the Association of Chartered Certified Accountants, the firm is Chartered Certified. If all of the partners/directors are members of one, or more, of the Institutes of Chartered Accountants in England and Wales, Ireland or Scotland, the firm is Chartered. If all of the partners/directors are members of ACCA and one, or more, of the above-mentioned Institutes, the firm is Mixed Chartered/Certified. If all of the partners/directors are members of the Association of Authorised Public Accountants, the firm is Authorised. Any other combination of partners/directors, including firms with unqualified partners, is Other.

- Chartered Certified Mixed Chartered Certified/Chartered Chartered
 AAPA Other (specify)

Job category

Which one of the categories below best describes your work?

- General practising services
OR specialising in: Audit Insolvency Taxation
 Management consultancy Information technology
 Other (specify)

Number of partners/directors

- Sole practitioner 2–3 4–6 7–9 10–99 100+

Note on obtaining a practising certificate

If you wish to use up to one year of your pre-membership experience towards your eligibility for an ACCA practising certificate or ACCA practising certificate and audit qualification the experience should be obtained in an ACCA Approved Employer – practising certificate development and your workplace mentor must be the training principal or partner. For an ACCA practising certificate and audit qualification your workplace mentor or training supervisor must be an audit principal and your experience must be documented in a Practising Certificate Training Record. ACCA reserves the right to request additional information as deemed necessary.

INDUSTRY, COMMERCE OR PUBLIC SECTOR

- If you work in industry, commerce or public sector cross this box.

Business category

Which one of the categories below best describes your employment?

- Retail/Consumer Energy and utilities Manufacturing/Industry/Engineering Transport/Distribution
 Professional services IT/Communications Pharmaceuticals/Healthcare Leisure/Tourism/Travel
 Banking Insurance/Investment Education Local government
 National government Not for profit Health
 Other (specify)

Job category

Which one of the categories below best describes your work?

- Internal auditing General management Data processing/Management Management accounting
 Company secretarial Taxation Financial management/Treasurership Financial accounting
 Other (specify)

Number of people in organisation

- 1–10 11–50 51–250 251–2000 2001+

NOT EMPLOYED

- If you are not employed please cross this box.

DECLARATION

I confirm that I have completed the ACCA Practical Experience Requirement (PER) as specified in the Chartered Certified Accountants Regulations. I understand that if selected for a practical experience audit I will be required to provide evidence of meeting ACCA's practical experience requirements.

I have read Byelaw 8, liability to disciplinary action, and I confirm there is nothing I should bring to ACCA's attention at the present time. I agree that while I am a member of ACCA I will notify ACCA about any event which may engage ACCA Byelaw 8 and make me liable to disciplinary action. I agree to comply with ACCA Charter, Byelaws, Regulations and Code of Ethics and Conduct from time to time in force. I understand that the UK Rehabilitation of Offenders Act 1974 does not apply to the accountancy profession, and that I am therefore required to disclose spent convictions.

I undertake that, if admitted as a member, I will, so long as I remain a member of ACCA, abide by the byelaws and all regulations made there under. I further undertake that I will use the designation 'Chartered Certified Accountant' and the designatory letters 'ACCA' (or 'FCCA' when I become a fellow) only while I remain a member of ACCA and, where required by the Chartered Certified Accountants Global Practising Regulations, only if I hold a practising certificate. I am aware of the importance of professional values, ethics and behaviours and my obligation to ACCA's code of ethics.

I acknowledge my duty to maintain the quality of my knowledge and will undertake adequate continuing professional development as directed by Council and specified in the Chartered Certified Accountants Membership Regulations. I am aware that failure to comply with certain continuing professional development requirements may lead to removal from the register of members.

I agree to pay the membership admission fee (£197 in 2012) and understand that I will be invoiced for this amount on successful conversion to ACCA membership. I declare that I have read and fully understood the declaration. I am aware that failure to pay sums due to ACCA may lead to removal from the register of members.

I declare that the information contained in this application is true, accurate and complete to the best of my knowledge and belief. I acknowledge that any statement contained therein which is known by me to be false may invalidate this application and any decision reached thereon by the Council of ACCA.

Signature

Date

CHECKLIST

To be eligible for admission to membership you must have

- Completed the exams.
- Achieved 13 performance objectives to the satisfaction of a workplace mentor/training supervisor and have recorded your progress through the Trainee Development Matrix (TDM).
- Completed and recorded a minimum of 36 months relevant experience via your PER annual return.
- Completed the Professional Ethics module, if you registered after 1 January 2007.

Additional notes

- As a guideline, ACCA considers full-time work experience to be 140 hours per month. 1540 hours of part-time work equates to 12 months of full-time work experience. This discounts annual leave etc. If any of your relevant experience has been achieved in a **part-time** role please enclose a breakdown of the hours worked together with your application.
- Up to 12 months' lecturing experience can count towards the PER for membership. The lecturing experience must be at a level at least equivalent to the Fundamentals level of the ACCA Qualification and cover basic accounting, business studies and finance-related subjects. If any of your relevant experience has been achieved in a **lecturing** role please enclose detail of the subjects and level taught together with your application.
- If you work in **public practice** and you sign or produce any accounts or report or certificate of tax return concerning any person/ organisations financial affairs that may be relied upon by a third party please enclose a current job description together with your application. Any member who undertakes work falling within ACCA's definition of public practice must hold a Practising Certificate from ACCA even if a Practising Certificate is held from another body.