

# PRACTITIONER'S PATHWAY APPLICATION FORM

How to register for Practitioner's Pathway including membership of TAI Practitioners & Advisers Ltd (TAI PAL):  
Return completed registration form by **mail** to Tax & Super Australia, PO Box 226, Flinders Lane, Victoria 8009;  
scan and **email** to [info@taxandsuperaustralia.com.au](mailto:info@taxandsuperaustralia.com.au)  
If you have any questions, please call (03) 8851 4555.

## > Applicant details

Dr       Mr       Mrs       Ms       Other (please specify)

First and middle names

Preferred name

Surname

Date of birth

## > Contact details

Company name

Position/title

ABN/ACN

Company street address

Suburb

State

Postcode

Company postal address

Suburb

State

Postcode

Telephone (work)

Fascimile (work)

Mobile

Email (work)

Company website

Home address

Suburb

State

Postcode

Telephone (home)

Email (home)

## > Application for

**FELLOW** TAI Practitioners & Advisers Ltd membership (voting rights) @ \$279pa Complete all sections of form. Add \$50 application fee

**ASSOCIATE** TAI Practitioners & Advisers Ltd membership @ \$199pa Skip 'Fellow only' sections. Add \$50 application fee

**Please note:** To gain TAI PAL Fellow membership you must also hold membership with Tax & Super Australia (TSA).

This does not apply to TAI PAL Associate membership. You can register for both TAI PAL and TSA on this form.

Please visit [www.taxandsuperaustralia.com.au/join](http://www.taxandsuperaustralia.com.au/join) to view membership benefits.

I am already member of Tax & Super Australia and my membership number is:

OR please choose membership:

Professional Membership @ \$529\*pa

Practice Membership @ \$729\*pa (+\$129 per additional member)

## > Payment details (Cheque/Bank Draft should be made payable to Tax & Super Australia Ltd; prices include GST)

Amount \$

Cheque       Visa       Mastercard       Direct Deposit (BSB: 033-050; Acc: 509-885; name as reference)

Card No               CCV    Expiry   /

Cardholder's name

Cardholder's signature

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> **Education qualifications (Fellow applicants only)** *Submit certified copies of all listed qualifications and certifications*

List your educational qualifications below (if you need more room, please attach a separate sheet)

Level (eg. Diploma, Bachelor, Masters)    Area (eg. Accounting, Business, Commerce)    Country

List your memberships and accreditations below (if you need more room, please attach a separate sheet).

Associations (eg. CPA, FPA, CA ANZ)    Member type (eg. Member, Fellow)    Designation (eg. CA, CPA, CFP)

> **Public Practice Certificate (Fellow applicants only)**

Nominate name for Public Practice Certificate:

> **Registrations (Fellow applicants only)**

Tax Practitioner Board registrations held:

Tax Agent     BAS Agent     Tax (Financial) Adviser

Reg no:

Reg expiry date:

I am a registered SMSF Auditor

I am a Registered Company Auditor

I hold an AFSL / I am an authorised representative of the holder of an AFSL.

Other (please list):

> **Compliance declarations (Fellow applicants only)**

I declare that I am compliant with the CPE requirements prescribed by the TAI Practitioners & Advisers Ltd.

I declare that I have a current professional indemnity policy complying with the rules of TAI Practitioners & Advisers Ltd  
**(please supply certificate of currency).**

> **Declaration    Individual member declaration**

I hereby apply to become a member of TAI Practitioners & Advisers Limited (TAI PAL) and agree to disclose any further information required by TAI PAL. I declare that all information supplied in this application is true and correct.

I declare that in the past 5 years, I have not:

1. Been convicted of a criminal or serious civil offence, or been subject to any disciplinary action under the Corporations, SIS and Financial Services legislation
2. Been subject to any disciplinary action or investigations by a professional association or regulatory body, nor have I had any restrictions or disqualifications imposed on my professional status by any professional association or regulatory body
3. Been declared bankrupt in my personal capacity, or operated as an officer of a corporate entity which has entered into external administration

Once admitted to membership, I agree to pay all membership fees within 14 days of notification. I understand that my membership may cease if the fees are not paid by the due date.

I agree to abide by the Constitution, General Membership Rules and Conditions, Conduct and Disciplinary Procedures and Privacy Policy of TAI PAL.

I agree not to use the TAI Practitioners & Advisers Ltd designations, or in any way hold out to be a Fellow, until obtaining Fellow accreditation.

Applicant's signature

Date