

# Application for ICAEW membership – Chartered Professional Accountants Canada (CPA Canada)



Please complete **all sections** of this form in block capitals and black ink. Please return all sections of this form to:  
**ICAEW Finance PO Box 6173 Milton Keynes MK10 1TW UK.** For enquiries please call +44 (0)1908 248 250

## WORKING IN THE REGULATED AREAS

Will you be engaged in public practice or statutory audit work or insolvency or investment business?

NO  
Please proceed with your application.

YES - UK/EEA  
This could affect your application. Please see terms and conditions.

YES - Rest of world  
Please proceed with your application and provide a copy of your official company letterhead so we can register the firm.

Do you already hold affiliate status with ICAEW?

NO  
Please proceed with your application.

YES  
This could affect your application. Please call the Records Team on +44 (0)1908 248 054 before proceeding.

## YOUR DETAILS

Gender  Male  Female

Preferred title  Mr  Mrs  Ms  Dr  Prof

Other

Important - please note that the names given below will be the official names used for all ICAEW membership records, correspondence and the ICAEW Certificate of Membership.

Forename(s)/given name(s)

Surname/family name

Date of birth DD MM YYYY

Home body

Designatory letters

Membership number

Date of admission DD MM YYYY

Residential address

Postcode/  
zipcode Country

Telephone

Fax

Email

Business address

Postcode/  
zipcode Country

Telephone

Fax

Email

Preferred address for correspondence  Business address  Residential address

## COMPLIMENTARY E-MEMBERSHIP TO THE FACULTIES AND COMMUNITIES

We're pleased to offer you up to six months' complimentary electronic membership of two Faculties and up to one year complimentary membership of two Communities. Please select from the list below. At the end of your complimentary membership you will be invited to take out a paid subscription. This offer is only available at the time of making your reciprocal membership application.

### FACULTIES

- Audit and Assurance
- Business and Management
- Corporate Finance
- Financial Services Investment Management
- Financial Services Insurance
- Financial Services Banking
- Tech
- Tax

### COMMUNITIES

- Charity Finance Professionals
- Entertainment, Sport & Media
- Farming & Rural Business
- Forensic & Expert Witness
- Healthcare
- Restructuring & Insolvency
- Solicitors
- Valuation

The following Communities are free. Please indicate if you would also like to become a member of any of these groups:

- |  |  |   |
|--|--|---|
| <input type="radio"/> Academia & Education       | <input type="radio"/> Energy & Natural Resources         | <input type="radio"/> Public Sector                 |
| <input type="radio"/> Career Breakers            | <input type="radio"/> Exporting                          | <input type="radio"/> Retail                        |
| <input type="radio"/> Construction & Real Estate | <input type="radio"/> Independent Advisers & Consultants | <input type="radio"/> Travel, Tourism & Hospitality |
| <input type="radio"/> Corporate Governance       | <input type="radio"/> Manufacturing                      | <input type="radio"/> Women in Finance              |
| <input type="radio"/> Data Analytics             | <input type="radio"/> Personal Financial Planning        |   |
| <input type="radio"/> Diversity                  | <input type="radio"/> Practitioner Business Advisors     |   |

## MANDATORY DECLARATION

At the point of registration/application with ICAEW, individuals are required to declare any past act or default that might be perceived as bringing discredit on themselves, ICAEW or the profession of accountancy, however long ago the act or default occurred and wherever it took place. Acts or defaults occurring after registration with ICAEW should be declared to ICAEW as soon as is practicably possible. If you are found to have failed to disclose relevant information, your registration/application may be revoked or membership prevented or withdrawn. In addition, disciplinary action may be taken against you.

Please note that the provisions of s4.2 of the Rehabilitation of Offenders Act 1974 do not apply in the case of persons seeking to become chartered accountants and a full and accurate response is therefore required even if your convictions are now regarded as spent. The only exception to this requirement is convictions and cautions which are designated 'protected' under the Rehabilitation of Offenders Act 1974 (Exceptions) Order 1975 (Amendment)(England and Wales) Order 2013.

If you think that your conviction may be 'protected' further guidance can be viewed on the Disclosure and Barring Service and Nacro websites.

**Acts requiring disclosure would include** (but are not limited to):

- being found guilty of (or having pleaded guilty to) any criminal offences;
- having been charged with a criminal offence which is as yet to come to trial;
- entering into an Individual Voluntary Arrangement or similar composition with creditors;
- failing to satisfy a judgement debt;
- being the subject of an adverse finding by a professional body or regulator;
- having had a disqualification order made, or having given a disqualification undertaking, under the Company Directors Disqualification Act 1986, or similar overseas legislation; or
- having entered into bankruptcy or being a discharged bankrupt.

Do any of the above circumstances (or similar) apply to you?

YES  NO

If any of the acts or defaults listed above do apply to you, or you think that there are similar matters which you should declare, please attach details with your application. Some of the matters listed are UK specific, but you should always declare any equivalent act or default which occurred outside the UK. Please note that if you make a disclosure, this will not automatically result in your registration being refused. ICAEW may, however, wish to make further enquiries before reaching a decision.

## DECLARATION

I acknowledge that, even if I have met all the requirements and conditions, I may be required to provide additional information, and my application may or may not be approved.

I undertake to notify ICAEW of any disciplinary, regulatory or criminal matters referred to above which arise subsequent to this application within 14 days of becoming aware of them.

I confirm that, to the best of my knowledge and belief, the information in this application is true and correct, and in particular faithfully reflects my experience relevant to this application.

Print name

Signature

Date DD MM YYYY

## SUPPORTING DOCUMENTATION

I enclose a current letter of good standing from my home body (for legacy members of either CMA Canada or CGA Canada, please see point 4 of the eligibility criteria below)

As part of the application process, ICAEW will contact your home body for verification of membership details.

## TERMS AND CONDITIONS

### Eligibility criteria

You are eligible to apply for reciprocal membership of ICAEW if you:

- are a current member of Chartered Professional Accountants Canada (CPA Canada) ;
- have obtained membership of your home body by complying with its training and examinations requirements;
- can provide documentary confirmation that you are a member in good standing; and,
- if you are a legacy member of either CMA Canada or CGA Canada, your letter of good standing will also need to provide confirmation that you have completed an additional two years' post qualification work experience. Please contact your local provincial or territorial CPA body for more details on this process.

### Practising certificates

Membership of ICAEW does not confer the right to practise accountancy or undertake work in the regulated areas of audit, insolvency or investment business. Members wishing to practise in the UK or EEA will be required to obtain an ICAEW practising certificate.

Further conditions apply to those seeking to work in regulated areas.

For more information on practising certificates please call +44 (0)1908 248 250.

### Designatory letters

ICAEW members may use the designatory letters ACA and title 'chartered accountant', subject to the regulations which apply to all ICAEW members.

### Continuing Professional Development

Members joining ICAEW under these reciprocal arrangements will be expected to comply with CPD requirements and make an annual declaration that they have done so.

### Working in the regulated areas

The UK Government regulates who may practise audit, insolvency and investment business. Individuals and firms working in these areas must be appropriately authorised. For more information please call +44 (0)1908 248 250.

### Code of Ethics

Members joining under these reciprocal arrangements will be expected to comply with the ICAEW Code of Ethics. For more information visit [icaew.com/ethics](https://www.icaew.com/ethics)

### Fees

Membership of ICAEW incurs a one-off admission fee (waived for reciprocal members in the UK or Europe), an annual subscription fee and an annual practising certificate fee (if required). All ICAEW subscriptions run from January to December.

# ICAEW membership reciprocal agreement – payment details

## PAYMENT

Admittance date	Admission fee		Subscription fee	Total	
	UK/EU <sup>†</sup> resident	Non UK/EU resident		UK/EU resident	Non UK/EU resident
1 January 2020 to 30 June 2020	£0.00	£300.00	£395.00	£395.00	£695.00
1 July 2020 to 31 December 2020	£0.00	£300.00	£197.50	£197.50	£497.50

<sup>†</sup> **Please note** that this includes Channel Islands and all countries in Continental Europe and The Russian Federation.

## PAYMENT METHODS

Send completed form and cheques to: **ICAEW Records/Members Department Metropolitan House 321 Avebury Boulevard Milton Keynes MK9 2FZ UK**

To pay by payment card send completed form to [records@icaew.com](mailto:records@icaew.com). Once your application is ready we will contact you to make payment.

I enclose a cheque for £ \_\_\_\_\_ made payable to CHARTAC

### Using your personal information

The protection of personal privacy is an important concern to ICAEW. Any personal data collected will be treated in accordance with current data protection legislation. We will use your personal data to deliver your inclusive membership services including; advice, communication, continuous professional development, eligibility for CABA, networking, products, quality, regulation, research, services, professional standards, voting and to administer your membership account. In order to meet our membership obligations to you we may share relevant personal data with connected communities, faculties, committees, local groups, district societies and external provider partners. For more information about our data protection policy please go to [icaew.com/dataprotection](http://icaew.com/dataprotection)

## FOR OFFICE USE ONLY

Division: **IMEM**

Product code: **REGIMEMAD**

Record number

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