



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 practical experience supervisor.
- Achieved 36 months of relevant supervised experience.
- Completed the Professional Ethics module or Ethics and Professional Skills module

ACCA will already hold information relating to your practical experience if you have been updating your *My Experience* record via *myACCA*.

Please indicate here if you have completed your experience with a gold or platinum level ACCA Approved Employer and are claiming the performance objective exemption.

Please provide the name of your Approved Employer

If you are claiming the performance objective exemption on the basis of working for a platinum or gold level ACCA Approved Employer (trainee development stream) you will be required to complete and return an Approved Employer performance objective exemption form along with your application. This can be downloaded from https://www.accaglobal.com/content/dam/ACCA_Global/Employers/approved-employer/PER-confirmation-form.pdf. Please retain a copy of this form in case it is required to validate your membership application.

ACCA retains the right to independently seek verification from the Approved Employer.

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.

When completed, please return this form and make payment by calling ACCA Connect at the number below:

Customer Services ACCA 110 Queen Street Glasgow G1 3BX United Kingdom
members@accaglobal.com

PERSONAL DETAILS

▼ Forename(s)

▼ Surname

▼ Date of birth (DD MM YYYY)

▼ Honours (classification)

PLEASE COMPLETE THE FOLLOWING SECTIONS ONLY IF YOUR DETAILS ARE DIFFERENT FROM THOSE CURRENTLY HELD BY ACCA.

NEW RESIDENTIAL ADDRESS

▼ Number/Street

▼ Town/City

▼ County/State

▼ Postcode

▼ Country

▼ Mobile tel no (incl area code)

NEW BUSINESS ADDRESS

▼ Job title

▼ Company name

▼ Number/Street

▼ Town/City

▼ County/State

▼ Postcode

▼ Country

▼ Business tel no (incl area code)

Please indicate the address to which you wish your ACCA correspondence to be sent:

Residential Business

Do you wish your town and country of residence to appear in the online *Directory of members*?:

Yes No

Receiving communications from ACCA

This section sets out certain information and options on how ACCA may communicate with you, the types of information ACCA may send to you and the extent to which ACCA will discuss your details with certain third parties.

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

Communication methods

ACCA may communicate with you by e-communications (including email and SMS), phone or by post using the contact details provided by you. E-communications are ACCA's preferred method of sending publications, promotional information and updates, and affiliate/member account correspondence.

Please choose one of the following options:

- I would like to receive all correspondence from ACCA by paper
- I would like to receive all correspondence from ACCA by e-communications (including my affiliate/member account correspondence)
- I would like to receive publications and promotional information and updates by e-communications but still receive my affiliate/member account correspondence by paper.

ACCA employers

ACCA often communicates with employers to discuss improvements and ways in which ACCA can provide enhanced support for members and students. When communicating with employers it is often helpful to provide a list of ACCA members and trainees who are working at that company. Do you agree to your details being passed to employers as described above?

- Yes No

Third party promotional 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 studies and career development. All third party organisations are strictly vetted and the mailing/email list is never supplied directly to them. All campaigns are carried out by ACCA or an ACCA approved agency. Do you agree to your details being passed to third party organisations as described above?

- Yes No

Data protection

ACCA may use your personal data provided on this form for the purposes of:

- membership administration
- sending you publications and other communications
- responding to enquiries and investigating complaints
- if you are a dual or multi-qualified member, we may share details with your other professional association(s)
- complying with our regulatory obligations.

Once approved as a member, you can update your information through your myACCA account at any time. ACCA may share information with suppliers and our auditors. If you are a dual or multi-qualified member, or applying for a joint scheme, ACCA may share details with your other professional associations(s). Please note that for individuals based outside the UK, your information will be held in ACCA's main information systems which are located in the EU and may be accessed by ACCA's local office in your country of residence. ACCA processes information within the EU, but may also transfer data outside of the EU as part of its operations and service delivery.

For residents of China

- By filling in this form and ticking the box, I give my consent that ACCA can collect, use, transfer and share the personal information I have entered according to ACCA's privacy notice, to process and contact me about industry news, events, career tips and other information relevant to their qualification or to me via the official email address, our monthly e-magazine, potential and relevant events/activities information.

You can update your information or opt-out from communication at any point by contacting us. ACCA may share information with suppliers and auditors. Please note that for individuals based outside the UK, your information will be held in ACCA's main information systems which are located in the EU and maybe accessed by ACCA's local office in your country of residence. ACCA processes information within the EU, but may also transfer data outside the EU as part of its operations and service delivery.

For more information on how your information and rights are respected, please see our [privacy notice](https://cn.accaglobal.com/privacy/policy.html) (https://cn.accaglobal.com/privacy/policy.html) or contact privacy@accaglobal.com

MEMBERS' NETWORK

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

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

This adds value to being an ACCA member by making it easier for you to connect with other members locally or within your sector and to hear about relevant events that you may be interested in attending.

At anytime you can update your details regarding member networks allocation through your myACCA account.

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 ACCA, 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?

- | | | | |
|---|---|---|--|
| <input type="checkbox"/> Internal auditing | <input type="checkbox"/> General management | <input type="checkbox"/> Data processing/Management | <input type="checkbox"/> Management accounting |
| <input type="checkbox"/> Company secretarial | <input type="checkbox"/> Taxation | <input type="checkbox"/> Financial management/Treasurership | <input type="checkbox"/> Financial accounting |
| <input type="checkbox"/> Other (specify) <input type="text"/> | | | |

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 understand that when transferring to membership, I could become liable to disciplinary action for events which engage ACCA Byelaw 8, liability to disciplinary action, which occurred before or after I transfer (read **Notes** section below now).

I confirm I have now read the **Notes** section below and:

- I understand that as a member of ACCA I must adhere and keep updated with the ACCA rulebook at all times. This is available online at <http://www.accaglobal.com/rulebook>
- I understand that if I fail to declare an event which may engage Byelaw 8, or if I provide any false or misleading statement in this form, I may face disciplinary action which may involve an allegation of dishonest conduct, and may also invalidate any decision reached in this application;
- I understand while I am a member of ACCA I will promptly notify ACCA in writing about any event which may engage Byelaw 8;
- I agree to comply with ACCA's Charter, Byelaws, Regulations and Code of Ethics and Conduct;
- I have not been subject to any criminal conviction and/or caution;
- I have not been disciplined by any professional body and/or regulator;
- I have not been subject to any other matters which may engage Byelaw 8 that have not already been brought to the attention of ACCA's Assessment or Investigations Department in writing;
- I understand that the UK Rehabilitation of Offenders Act 1974 does not apply to me (as it does not apply to the professions of chartered accountant, certified accountant) and that I am required to disclose all convictions and/or cautions, including those that are spent, provided that they are not 'protected' as defined by the Rehabilitation of Offenders Act 1974 (Exceptions) Order 1975 (as amended in 2013). The amendments to the Exceptions Order 1975 (2013) provide that certain spent convictions and cautions are 'protected' and are not subject to disclosure;
- I understand that any matters which I have disclosed to ACCA which engage Byelaw 8 will be taken into account when dealing with my application, but that the matters may not automatically stop me transferring to membership;
- I confirm and declare I have included everything ACCA needs to know, and there is nothing else I should bring to ACCA's attention at the present time.

I further undertake that I will only 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. I understand that if I engage in any public practice activities or hold myself out to do so (as defined by The Chartered Certified Accountants Global Practising Regulations 3 and 4) as a director, partner, LLP member or principal in an accountancy practice, I will need to hold an ACCA practising certificate or arrange to be placed on ACCA's register of practitioners.

I understand that ACCA's definition of public practice extends beyond audit to incorporate all types of work generally associated with an accountancy practice, such as producing accounts, tax returns, but excluding book keeping services, and requires me to hold an ACCA practising certificate.

I understand that if I provide external accountancy services as defined by CCAB guidance (which includes book keeping/payroll services or any service which involves the recording, review, analysis, calculation or reporting of financial information, and which is provided under arrangements other than a contract of employment), I must be registered for anti-money laundering supervision with HM Revenue and Customs or another Professional Body Supervisor recognised for such purposes prior to provision of such services. NB: Members outside the UK should check what local obligations they may have regarding anti-money laundering supervision.

I have read, understood and checked my position against the factsheet: *Am I in public practice?* https://www.accaglobal.com/content/dam/ACCA_Global/Members/Forms/Am%20in%20Public%20Practice.pdf

I acknowledge my duty to the public to ensure that the quality of my knowledge and service is maintained after qualification. I therefore accept my responsibility to undertake adequate continuing professional development as directed by Council and specified in the Chartered Certified Accountants' Membership Regulations.

I consent to ACCA processing my personal data as described under the Communications, Marketing and Data Protection section.

I agree to pay the membership admission fee (258GBP in 2020) and understand that I will be invoiced for this amount on successful conversion to ACCA membership. I am aware that non-payment of sums due to ACCA may lead to removal from the register of ACCA members. Payment can be made via your online *myACCA* account when you have successfully transferred to ACCA membership.

Notes: ACCA Byelaw 8 sets out the details of the events which could lead to disciplinary action. These events include (but are not limited to) the following: Incompetence in carrying out work; breach of ACCA Byelaws or Regulations; disciplinary action against you by another professional body or regulatory body; entering a voluntary arrangement, administration or insolvency; failure to satisfy a judgment debt without reasonable excuse within two months; criminal conviction and/or caution; civil finding of acting fraudulently or dishonestly as a party or witness in civil proceedings; misconduct – this includes (but is not limited to) any act or omission which brings, or is likely to bring, discredit to you, a relevant firm, ACCA or the accountancy profession. Please note that hearings of ACCA's Disciplinary Committee shall be open to the public and all orders and findings shall be publicised unless the Committee determines otherwise.

Signature

Date

¹ If you have any queries as to whether your current work constitutes public practice, please contact ACCA's Authorisation Department on +44 (0)141 534 4175 or via authorisations@accaglobal.com

ADDITIONAL NOTES

- As a guideline, ACCA considers full-time work experience to be 140 hours per month. 1,540 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's/organisation's financial affairs that may be relied upon by a third party please enclose a current job description together with your application. Any member must hold an ACCA practising certificate if they undertake work falling within ACCA's definition of public practice in a designated territory or in a country of jurisdiction that, according to local legislative and/or regulatory requirements, requires an ACCA practising certificate. This is the case even if a licence to practise is held from another body. Any member who is carrying on public practice in a country or jurisdiction where an ACCA practising certificate is not required must notify ACCA and be placed on a register of ACCA practitioners. Such members must confirm that they have complied with any local legislative and/or regulatory requirements to be eligible to carry on public practice.