

# APPLICATION TO TRANSFER TO CONCESSIONARY MEMBERSHIP CATEGORIES

This application form is for use by full members of the Institute who wish to:

- transfer to a concessionary membership category; or
- transfer between categories.

The Information Notes at the back of this form will assist you in completing your application. Please read them carefully.

## 1 COLLEGE OF MEMBERSHIP – Indicate the College of which you are a member (please tick)

- Chartered Accountant
- Associate Chartered Accountant
- Accounting Technician

## 2 CURRENT MEMBERSHIP STATUS - Indicate your current membership status held (please tick)

- Fully active membership
- Retired status
- Concessionary category (career break)
- Concessionary category (low income)

## 3 PERSONAL DETAILS – please use capital letters (See Information Note 1)

Institute ID: \_\_\_\_\_

First / Given Name \_\_\_\_\_

Preferred First Name (if different to formal) \_\_\_\_\_

Surname / Family Name \_\_\_\_\_

Title (Mr/Mrs/Ms/other) \_\_\_\_\_

Previous name (if applicable) \_\_\_\_\_

Date of Birth \_\_\_\_\_

Business Address \_\_\_\_\_  (tick if this is your preferred mailing address)  (tick if this is your preferred billing address)

Postcode \_\_\_\_\_

City / Town \_\_\_\_\_

Country (other than New Zealand) \_\_\_\_\_

Telephone \_\_\_\_\_

Cellphone \_\_\_\_\_

Email \_\_\_\_\_

Fax \_\_\_\_\_

Home Address \_\_\_\_\_  (tick if this is your preferred mailing address)  (tick if this is your preferred billing address)

Postcode \_\_\_\_\_

City / Town \_\_\_\_\_

Country (other than New Zealand) \_\_\_\_\_

Telephone \_\_\_\_\_

Cellphone \_\_\_\_\_

Email \_\_\_\_\_

Fax \_\_\_\_\_

Alternative Address \_\_\_\_\_  (tick if this is your preferred mailing address)  (tick if this is your preferred billing address)

Postcode \_\_\_\_\_

City / Town \_\_\_\_\_

Country (other than New Zealand) \_\_\_\_\_

Telephone \_\_\_\_\_

Cellphone \_\_\_\_\_

Email \_\_\_\_\_

Fax \_\_\_\_\_

# APPLICATION TO TRANSFER TO CONCESSIONARY MEMBERSHIP CATEGORIES

## 4 MEMBERSHIP STATUS SOUGHT (See Information Note 2)

I wish to transfer to the following concessionary status for the current financial year:

**Concessionary category (career break)**

**I am temporarily withdrawn from the paid workforce for the following reason:**

- Parenting
- Unemployment
- Ill health
- Full time study
- Travel overseas (not working)
- Other \_\_\_\_\_

**and my total gross income from engaging in accounting or accounting-related work is less than \$5,500 per annum.**  Yes  No

For this purpose, total gross income includes, where a member utilises a company or other structure for conducting such work, the total gross income earned by that entity from accounting and accounting-related work. Income such as superannuation income, personal investment income, and nominal or token honorariums is excluded from the income assessed for eligibility purposes.

OR

**Concessionary category (low income)**

**I have a total gross income of less than \$26,500 per annum from engaging in accounting or accounting-related work.**  Yes  No

For this purpose, total gross income includes, where a member utilises a company or other structure for conducting such work, the total gross income earned by that entity from accounting and accounting-related work. Income such as superannuation income, personal investment income, and nominal or token honorariums is excluded from the income assessed for eligibility purposes.

Effective date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ (If in the future)

PLEASE NOTE:

1. Concessions will not be granted retrospectively.
2. If approved the effective date will (at the earliest) be the date this application is received by the Institute.

## 5 WORK ACTIVITIES (See Information Note 3)

If you are transferring to concessionary category (low income) from concessionary category (career break) or retired status, you should complete the following if you have undertaken any practical experience during this time:

**Activities** – I have been engaged in the following activities while holding concessionary category (career break) or retired status:

From (date)	To (date)	Position	Organisation	Hours per week	Accounting or Accounting-Related Work (Yes or No)



# APPLICATION TO TRANSFER TO CONCESSIONARY MEMBERSHIP CATEGORIES

## INFORMATION NOTES

### APPLICATION PROCESS

This application form is for full members of the Institute who wish to transfer to the following concessionary membership categories:

- Concessionary category (career break)
- Concessionary category (low income)

or to transfer between these concessionary categories.

If you are wanting to transfer to retired status, you should complete the form "Application for retired membership status". This form is available on the Institute's website [www.nzica.com](http://www.nzica.com)

For further information on the concessionary categories please read the Information Sheet available on the Institute's website – [www.nzica.com](http://www.nzica.com)

Consideration of your application may take up to four weeks. Please provide as much information as possible that is relevant to your application. An incomplete application will not be considered until all the required information and documentation has been received.

### PRIVACY ACT

The information provided on this form will be used by the New Zealand Institute of Chartered Accountants to:

1. Process and assess this application
2. Maintain the membership database
3. Enable the New Zealand Institute of Chartered Accountants to carry out its various functions under the Institute of Chartered Accountants of New Zealand Act 1996 and the Rules of the Institute of Chartered Accountants, which may involve disclosure to other agencies for those purposes
4. Keep you informed about products and services that may be of interest to you, which may involve disclosure to selected agencies authorised by the New Zealand Institute of Chartered Accountants
5. Communicate with you and target professional development initiatives.

### NOTE 1 – PERSONAL DETAILS

Please provide both postal and street addresses if they differ. If any of these details change, you should advise Registry Services Helpdesk immediately to avoid any delay in receiving information and goods.

### NOTE 2 – MEMBERSHIP STATUS SOUGHT

Indicate the concessionary category you are applying for and the effective date. Any concession granted will only apply to the financial year during which the application is made. An application must be made for the concession each year. Concessions will not be granted retrospectively.

Members granted career break status are not normally required to complete Continuing Professional Development (CPD) while holding career break status, although they are encouraged to undertake CPD in preparation for their return to the workforce.

Members granted low income status are required to complete the standard number of CPD hours associated with their College while holding low income status, but with an adjusted weighting (75% unstructured and 25% structured).

### NOTE 3 – WORK ACTIVITIES

This section need only be completed if you currently hold retired or concessionary category (career break) status and you are applying to transfer to concessionary category (low income) status.

Although paid employment is not compatible with a career break or retired status, consideration may be given to any unpaid practical experience undertaken while on a career break or holding retired status.

### NOTE 4 - CONTINUING PROFESSIONAL DEVELOPMENT

Members who have been out of accounting or accounting-related work for a period of less than ten years will be required to complete catch-up CPD.

The amount of catch-up CPD will be calculated at the standard per annum rate to a maximum number of hours. **Credit will be given for CPD**

**undertaken by members during their career break or retired status.**

Catch-up CPD will normally need to be undertaken within 12 months of transferring to concessionary category (low income) or fully active status.

Once your application has been assessed, you will be advised of the amount of any CPD you are required to catch up.

Members who have been out accounting or accounting-related work for ten or more years will be referred to the Admissions Board who will determine the requirements they must meet for ongoing membership.

### NOTE 5 – DECLARATION

The information you give in the application form is covered by the declaration. The Code of Ethics is enforced by disciplinary powers based on the Institute of Chartered Accountants Act 1996 and the Rules of the New Zealand Institute of Chartered Accountants.

### RETURN ADDRESS

Please send your completed application to:

Registry Services Helpdesk

New Zealand Institute of Chartered Accountants

7th Floor, Tower Building

50 Customhouse Quay

PO Box 11342

Wellington 6142

### FURTHER INFORMATION

Membership enquiries are handled by Registry Services Helpdesk.

Contact details are:

Registry Services Helpdesk

Tel: 00 64 4-474 7840

Fax: 00 64 4-473 6303

Email: [registry@nzica.com](mailto:registry@nzica.com)

Website: [www.nzica.com](http://www.nzica.com)