

# Mentor's final report

Please complete **all sections** (1–5) and return the report to the **provisional member** to attach to their online application.

**Note:** Mentors and candidates should retain a copy of this signed final report for their records.

## Section 1 – Candidate's details

Title  Mr  Mrs  Miss  Ms  Other (please specify)

Given name/s (in full)  Family name

Membership number

ATE/RTE you have gained experience with

Period of Mentored Practical Experience  /  /  to  /  /   
(DD/MM/YYYY) (DD/MM/YYYY)

New employer details (if applicable)

## Section 2 – Mentor's details

Title  Mr  Mrs  Miss  Ms  Other (please specify)

Given name/s (in full)  Family name

Membership number

Member body (e.g. CA ANZ)

## Section 3 – Candidate competency requirements

Please select either **option A** or **B** from below:

### Option A: for candidates who completed the Candidate Mentored Practical Experience Logbook

CA candidates are required to meet the requirements for all professional competencies of the candidate's Mentored Practical Experience logbook up to level 3, and a minimum of two technical competencies, one up to level 3 (primary competency) and another at level 2 or above (secondary competency).

ACA candidates are required to meet the requirements for all professional competencies at level 2 and a minimum of one technical competency at level 2.

Section 3 continued overleaf >

I **verify** that this candidate has attained the required level of competence in the following technical competencies (please insert the appropriate level and **initial** the areas that apply below):

Technical competencies	Level 2 or Level 3*	Mentor initials**
Financial accounting and reporting		
Tax in audit		
Tax in practice		
Management accounting and business performance		
Audit and assurance		
Insolvency		
Risk		
Technology		
Data analysis and insights		
Strategy and performance		
Financial modelling		
Financial advice		
Superannuation		

I **verify** this applicant is competent in the following professional competencies (please insert the appropriate level and **initial** the areas that apply below):

Professional competencies	Level 2 or Level 3*	Mentor initials**
Self-management, learning and adaptive mindset		
Collaboration and relationships		
Communication		
Critical thinking and decision-making		
Professional values, ethics and attitudes		

\* **Please note:** for candidates to attain a **level 2** they will be working in an environment with moderate levels of ambiguity, complexity and uncertainty. They are expected to take a proactive approach in the workplace, and work as part of a team, carry out some tasks independently, be responsible for the quality of their own work, and exercise judgement within established parameters.

To attain a **level 3**, candidates will be working in an environment with high levels of ambiguity, complexity and uncertainty. They are expected to manage their own work, be responsible for the quality and quantity of work, exercise professional judgement, and potentially manage some business functions.

\*\*Mentor **must initial** relevant competencies achieved for form to be processed.

**Option B:** for candidates who completed a 'Recognised Training Employer in-house appraisal system'

I **verify** that this applicant has met the competency requirements of the above-named company's in-house appraisal system:

Yes  No

**Section 4 – Declaration**

In my opinion this person is suitable for full membership as a: (select the appropriate)

Chartered Accountant  Associate Chartered Accountant

This endorsement applies to the Mentored Practical Experience component of the admission requirements and is not to be used as a general reference. I declare that the information I have given in this form is complete, correct and up-to-date.

**Please sign and date**

Signature

Full name

Date   
(DD/MM/YYYY)

## Section 5 – Privacy statement

### Important: Your consent to disclosure

By providing personal information to us in this form you consent to CA ANZ:

- (a) Disclosing to third parties your (current or former) status as a member or candidate of CA ANZ;
- (b) Disclosing to regulators, law enforcement bodies, professional associations and government or statutory bodies the details of any final adverse determinations (including sanctions) in relation to your professional and/or ethical conduct that are made by CA ANZ's Professional Conduct bodies; and
- (c) Collecting from third parties information relating to your membership of a trade or professional association or union, your criminal record (if any), your health, religious beliefs or affiliation, racial or ethnic origin and any other sensitive information to the extent that it is reasonably necessary for one or more of the functions or activities of CA ANZ.

We collect, use and disclose your personal information in connection with your application, the management and administration of members and/or programs, the provision of products and services and/or to communicate with you.

If you do not provide your personal information, we may be unable to process your application. We may disclose your information to agents, contractors and service providers such as where we outsource functions and to other third parties

such as local and international professional bodies, ASIC and other regulators and government bodies. By completing this form, unless you opt-out, you consent to us also using and disclosing your information for promotional and marketing purposes. You can opt-out by contacting us at [privacy@charteredaccountantsanz.com](mailto:privacy@charteredaccountantsanz.com). We may also have collected information about you from a third party, for instance from other professional bodies with which we have reciprocal arrangements. Your information will also be used and disclosed as set out in CA ANZ's Privacy Policy, available at [www.charteredaccountantsanz.com/privacy-policy](http://www.charteredaccountantsanz.com/privacy-policy).

It is likely that your personal information will be disclosed to overseas recipients (as provided in our Privacy Policy, including the location of those entities). The Privacy Policy sets out how CA ANZ handles your personal information including how you can seek to access and correct your information or raise a privacy concern with us and how it will be dealt with as well as details about the disclosure of your information to entities overseas.

Chartered Accountants Australia and New Zealand. Formed in Australia. Members are not liable for the debts and liabilities of Chartered Accountants Australia and New Zealand. ABN 50 084 642 571.

I have read, understood and agree to and consent to the CA ANZ Privacy Policy and the Privacy Collection Statement above.

## Section 6 – Submitting your application form

### How to submit your application

Please return the completed *Mentor final report* to the **provisional member** to attach to their online application.

### Any questions

For further enquiries or additional information please contact the Member Support Team on:

**Email** [service@charteredaccountantsanz.com](mailto:service@charteredaccountantsanz.com)

**Phone Australia**  
1300 137 322 or +61 2 9290 5660 (outside of Australia)  
7am-7pm (AEST), Monday-Friday (excl. Public Holidays)

**New Zealand**  
0800 4 69422 or +64 4 474 7840 (outside of NZ)  
9am-9pm (NZ time), Monday-Friday (excl. Public Holidays)

**Website** [charteredaccountantsanz.com](http://charteredaccountantsanz.com)