

# Continuing Professional Development (CPD) Record Form

*Not for use by New Zealand resident members*

Please fill in your **Membership Number**, if known (please use a **BLACK** pen)

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Please complete **ALL** the sections (1-6) below, and return the application to Chartered Accountants Australia and New Zealand (CA ANZ) (see page 3 for contact details). **Please print in BLOCK LETTERS.**

## Section 1 – Personal details

Name

Company name

## Section 2 – CPD Record details

1. CPD for (dates)  to

2. Please indicate if you hold any of the following registrations/authorities: (tick the applicable box/es)

<input type="checkbox"/> Registered Company Auditor	Type A	<input type="checkbox"/> SMSF Auditor	
<input type="checkbox"/> Registered Trustee in Bankruptcy	Type B	Formal superannuation training	Type S
<input type="checkbox"/> Registered Tax Agent	Type T	Formal financial statement or compliance audit training	Type SF
<input type="checkbox"/> Registered BAS Agent	Type BA	Formal financial accounting training	Type SFA
<input type="checkbox"/> Registered Company Liquidator	Type L	<input type="checkbox"/> Reviewer of Second Tier Companies Limited by Guarantee	Type R
<input type="checkbox"/> Australian Financial Services Licensee (AFSL)	Type AF		

## Section 3 – Please supply details of each CPD activity\*

Date (DD/MM/YY)	Organisation presenting CPD activity	Description of CPD activity (Refer Regulation CR7, Commentary)	Specialist CPD type (See type codes above)	Number of CPD hours
/ /				
/ /				
/ /				
/ /				
/ /				
/ /				
/ /				
/ /				
/ /				
/ /				
			Total hours	

\*Please see examples of activities that qualify as Continuing Professional Development on page 2.



## Section 4 – Summary of CPD activities completed during the triennium

Year (DD/MM/YY)	Specialist hours											General hours	
	A	B	T	BA	L	AF	S	SF	SFA	R			
01 / 07 /	to	30 / 06 /											
01 / 07 /	to	30 / 06 /											
01 / 07 /	to	30 / 06 /											
Total hours													

## Section 5 – CPD activity information

Training activities undertaken need not be accounting related but should be appropriate to your field of work.

### The following are examples of activities that qualify as CPD

- Congresses, conferences, forums, conventions, courses, seminars, workshops, lectures and other professional educational activities presented by Chartered Accountants Australia and New Zealand
- Meetings of Chartered Accountants Australia and New Zealand or other professional accounting body technical discussion groups
- Appropriate educational activities provided by the member's employer or practice entity, either in-house or externally by individuals or organisations engaged by the employer
- Tertiary courses presented by educational institutions
- Appropriate educational and developmental activities presented under the auspices of academic institutions, commercial establishments or other professional bodies
- Researching and writing technical publications, preparation and delivery of technical papers. As a guide, three hours preparation may be claimed for each presentation hour
- Service on technical or research committees under the auspices of Chartered Accountants Australia and New Zealand, other professional bodies or organisations
- Programmed self-study through a third party provider, including self-study video or audio packages
- Chartered Accountants Program Workshops and examination markings.

### Please note:

Of the 120 hours of CPD to be completed over the triennium, up to 30 hours may be achieved by reading professional journals, technical bulletins, etc.

From 1 July 2015, holders of licenses or registrations in a specialist area must devote a minimum of 40% of their minimum CPD activity to each specialisation. If you hold more than one of these specialisations some CPD you undertake may be relevant to more than one of these and therefore may be considered more than once towards your 40% requirements.

From 1 July 2015, any individual or affiliate member signing a Self Managed Superannuation Fund audit report is required to undertake training in this area as detailed in CR7.

### PRIVACY STATEMENT

Privacy is important to Chartered Accountants Australia and New Zealand (ABN 50 084 642 571) (CA ANZ), its subsidiaries and the New Zealand Institute of Chartered Accountants, a regulatory body established under the New Zealand Institute of Chartered Accountants Act 1996 (NZ) (NZICA) and controlled by CA ANZ controlled entities (each CA ANZ, we, us or our).

We collect, use and disclose the personal information provided in this form for the primary purpose of assessing your compliance with your CPD responsibilities. If you do not provide the information requested in this form if you are selected and requested to do so in our CPD monitoring program, you may be excluded from membership. If you do not provide this information when applying for membership/readmission/CPP, you may not be granted approval for membership/readmission/CPP.

While your personal information is collected in Australia, it is likely that your personal information will be disclosed to overseas recipients outside of Australia and the European Economic Area in accordance with our Privacy Policy.

We will otherwise handle your personal information in accordance with our Privacy Policy. Our Privacy Policy also contains the contact details of our Privacy Officer / Data Protection Officer and information regarding your rights (including how to withdraw your consent, if applicable) and how you can seek to access and correct your personal information or raise a privacy concern with us and how it will be dealt with.

If you have any questions or concerns about this Privacy Statement, our Privacy Policy or how we handle your personal information, please contact our Privacy Officer / Data Protection Officer.

By submitting this form you acknowledge that you have read, understood and agree to CA ANZ's Privacy Policy and the important information contained in the above Privacy Statement.

## Section 6 – Declaration

I hereby confirm that this information is a true record of my CPD activity for the period stated.

I acknowledge and agree that by checking this box I will be taken to have signed this form by hand for the purposes of all relevant laws, that I warrant the accuracy and truthfulness of the information provided in this form, and that CA ANZ is entitled to and will rely on my checking this box as if I had signed this form by hand.

Signature

Full name   
Date  /  /

## HOW TO SUBMIT YOUR FORM

### CPD Monitoring

If you are submitting this form for CPD Monitoring purpose, please email form to [monitoring@charteredaccountantsanz.com](mailto:monitoring@charteredaccountantsanz.com)

### Application for Membership / Readmission / Certificate of Public Practice

If you are submitting this form for membership, readmission or CPP applications, please email form to [assessment@charteredaccountantsanz.com](mailto:assessment@charteredaccountantsanz.com)

## ANY QUESTIONS

If you have any questions you can contact the Service Centre at:

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

**AUSTRALIA** 1300 137 322

+61 2 9290 5660 (outside of Australia)

8AM–6PM (AEST) Monday – Friday (excl. Public Holidays)

**PHONE**

**NEW ZEALAND** 0800 4 69422

+64 4 474 7840 (outside of New Zealand)

8AM–6PM (NZ time) Monday – Friday (excl. Public Holidays)

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