

Continuing Professional Development (CPD) Record form

Please complete **all** the sections (1-5) below, and return the application to Chartered Accountants Australia and New Zealand (CA ANZ) (see **page 3** for contact details).

Section 1 – Personal details

Full name

Company name

Section 2 – CPD Record details

Duration of Continuing Professional Development (CPD): to
(DD/MM/YYYY) (DD/MM/YYYY)

| Date <small>(DD/MM/YYYY)</small> | Organisation presenting CPD activity | Description of CPD activity <small>(Refer Regulation CR 7)</small> | Specify: Verifiable or Non-Verifiable | Verifiable sub-type* | Number of CPD hours |
|-------------------------------------|---|---|---|-------------------------|---|
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| / / | | | | | |
| Total hours | | | | | <input style="width: 50px; height: 25px;" type="text"/> |

* If verifiable, specify if it pertains to **Ethics** or On the Job Training (**OJT**), otherwise leave blank. If On the Job training is to be included in verifiable hours, please attach the *On the Job CPD Evidence* form approved by the person authorising this training.

Section 3 – Summary of CPD activities completed during the triennium

| Date (DD/MM/YYYY) | | Verifiable hours | Non-verifiable hours |
|--------------------|-----------|------------------|----------------------|
| 01/07/ | to 30/06/ | | |
| 01/07/ | to 30/06/ | | |
| 01/07/ | to 30/06/ | | |
| Total hours | | | |

Section 4 overleaf >

Section 4 – CPD information and Privacy statement

CPD information

CPD is the learning and development that a Member undertakes to develop and maintain professional competence to enable them to continue to perform their roles competently. Training activities undertaken need not be accounting related but should be appropriate to your field of work. **Verifiable CPD** means CPD activities for which there is Verifiable Evidence to support their completion.

Means by which CPD can be verified include:

- (i) attendance records, registration forms or confirmation of registration in an activity;
- (ii) independent assessment by a competent individual that an activity has occurred;
- (iii) confirmation by an instructor, mentor, supervisor or tutor of participation in an activity;
- (iv) confirmation by an employer of participation in an in-house program, including firms' CPD logs;
- (v) published research work; and
- (vi) confirmation by other committee members (or Secretariat) of participation on a Technical Committee.

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
- 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, at least 90 hours must be verifiable. Of those 90 verifiable hours, at least 2 hours must pertain to professional ethics. Up to 30 hours may be achieved by reading professional journals, technical bulletins, etc.

Holders of licences or registrations in a specialist area must ensure that their training complies with the requirements of those registrations and specialisations.

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 5 – Declaration

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

By signing this form below, I declare that the information provided in this form is complete, true and correct. This form can be signed by manual signature or electronic signature (whether digital or encrypted). If this form is signed by electronic signature, it will have the same force and effect as a manual signature.

Please sign and date

| | | | |
|-----------|----------------------|-----------|---|
| Signature | <input type="text"/> | Full name | <input type="text"/> |
| | | Date | <input type="text" value="/ /"/> <small>(DD/MM/YYYY)</small> |

Section 6 – Submitting your CPD record form

How to submit your form

CPD Monitoring

If you are submitting this form for CPD Monitoring purpose:

Email monitoring@charteredaccountantsanz.com

Application for Membership/Readmission/ Certificate of Public Practice

If you are submitting this form for membership, readmission or CPP applications:

Email assessment@charteredaccountantsanz.com

Any questions

For further enquiries or additional information please contact the Chartered Accountants Service Centre on:

Email service@charteredaccountantsanz.com

Phone Australia
1300 137 322 or +61 2 9290 5660 (outside of Australia)
8am–6pm (AEST), Monday–Friday (excl. Public Holidays)

New Zealand
0800 4 69422 or +64 4 474 7840 (outside of NZ)
8am–6pm (NZ time), Monday–Friday (excl. Public Holidays)

Website charteredaccountantsanz.com