

# Application to be an Approved Training Employer (ATE)

(to be completed by an authorised senior employer representative)



An ATE is an organisation that meets Chartered Accountants Australia and New Zealand (Chartered Accountants ANZ) standards for offering the type of work experience that fulfils our practical experience requirements.

An organisation must obtain **Approved Training Employer (ATE)** status before a candidate can commence practical experience.

Please read the *Guide to the form* (page 4) carefully before you complete the application form.

Please complete **ALL** sections and submit to Chartered Accountants ANZ as indicated in **section 3**. Please print in **BLOCK LETTERS**.

## Section 1 – Company details

Name of company	<input type="text"/>	CA ANZ ID (if known)	<input type="text"/>
Street address	<input type="text"/>	City/Town	<input type="text"/>
	State <input type="text"/>	Postcode <input type="text"/>	Country <input type="text"/>
Postal address	<input type="text"/>	City/Town	<input type="text"/>
	State <input type="text"/>	Postcode <input type="text"/>	Country <input type="text"/>
Email	<input type="text"/>	ACN/ABN	<input type="text"/>
Phone	<input type="text"/>	Website	<input type="text"/>

ADDITIONAL LOCATIONS (if applicable):

**NOTE:** If the training and experience is offered by your organisation in **more than one** location, then please state the locations of any other branches below:

<b>Name of company</b>	<input type="text"/>	CA ANZ ID (if known)	<input type="text"/>
Trading/ Business name	<input type="text"/>	ACN /ABN	<input type="text"/>
Street address	<input type="text"/>	City/Town	<input type="text"/>
	State <input type="text"/>	Postcode <input type="text"/>	Country <input type="text"/>

<b>Name of company</b>	<input type="text"/>	CA ANZ ID (if known)	<input type="text"/>
Trading/ Business name	<input type="text"/>	ACN /ABN	<input type="text"/>
Street address	<input type="text"/>	City/Town	<input type="text"/>
	State <input type="text"/>	Postcode <input type="text"/>	Country <input type="text"/>

ATE COORDINATOR DETAILS (IMPORTANT: Provisional members can **not** act as the ATE Coordinator)

Full name	<input type="text"/>	Membership Number (if applicable)	<input type="text"/>
Position/Title	<input type="text"/>		
Email	<input type="text"/>	Phone (business)	<input type="text"/>

## Section 2 – Declaration

I, the undersigned, being authorised on behalf of  (Company name)  
wish to apply for approval to be recognised as an 'Approved Training Employer' (ATE) with Chartered Accountants ANZ.

I confirm that I have read the *Guide to the form* and confirm that  (Company name)  
meets Chartered Accountants ANZ's standards for offering the type of work experience that fulfils Chartered Accountants ANZ's practical experience requirements.

In support of this application, I agree that the organisation will: (please tick each box)

- |  |   |
|--|---|
| <input type="checkbox"/> Provide structured practical experience by establishing a documented and regularly monitored work experience program for all candidates undertaking their practical experience requirements for admission to Chartered Accountants ANZ. | <input type="checkbox"/> Display a professional approach to accounting with a supportive senior management attitude towards modern systems, compliance with best practice, and continuous improvement.  |
| <input type="checkbox"/> Conduct a reasonable mix of accounting work, so the candidates can obtain the appropriate range of practical experience.  | <input type="checkbox"/> Provide sufficient access to members of Chartered Accountants ANZ who are willing to act as mentors ( <b>Note:</b> mentors are encouraged to have no more than four candidates each at any one time).  |
| <input type="checkbox"/> Provide appropriate resources and procedures to provide quality staff development, including training.  | <input type="checkbox"/> Provide time during and outside working hours to enable candidates to successfully complete Chartered Accountants ANZ's Professional Competence Program ( <b>Note:</b> there is a requirement for CA candidates to sit a final exam for each module on a Tuesday and for them to attend three mandatory face-to-face workshops in the final Capstone module. Each module offers other opportunities (usually outside standard working hours) for candidates to attend face to face or virtual presentations on specific topics). |
| <input type="checkbox"/> Provide quality assurance processes including nomination of person/s responsible for the program, recruiting, developing and monitoring the progress of candidates.   | <input type="checkbox"/> Provide staff with reasonable access to the internet and the required computer resources to complete Chartered Accountants ANZ's Professional Competence Program.  |
| <input type="checkbox"/> Provide internal procedures for regular monitoring and supervision of candidates' practical experience. including appropriate on-the-job training, counselling and development of Chartered Accountants ANZ's logbook competencies.     |   |
| <input type="checkbox"/> Be committed to professional development and to ensuring all staff remain up-to-date technically and with matters affecting the wider economic community.   |   |

PLEASE SIGN AND DATE

Signature  Full name   
Date

## Section 3 – Submitting your application form

### HOW TO SUBMIT YOUR FORM

Please email your completed form to:

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

**OR**



If you have a 'digital signature'  
simply click the submit button

### ANY QUESTIONS

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

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

**PHONE** **AUSTRALIA** 1300 137 322  
+61 2 9290 5660 (outside of Australia)  
8am-6pm (AEST) **Monday – Friday** (excl. Public Holidays)

**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)

## 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 affiliations, racial or ethnic origin and any other sensitive information to the extent that it is reasonably necessary for one 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](http://www.charteredaccountantsanz.com/privacy). 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.

# Application to be an Approved Training Employer (ATE) Guide to the form



## WHAT IS AN APPROVED TRAINING EMPLOYER (ATE)?

An ATE is an organisation that meets the Chartered Accountants ANZ's standards for offering the type of work experience that fulfils the practical experience requirements to become a Chartered Accountant (CA) or Associate Chartered Accountant (ACA).

## WHAT CRITERIA MUST AN ORGANISATION MEET FOR APPROVAL TO BE RECOGNISED AS AN ATE?

Chartered Accountants ANZ has established criteria that all ATEs are required to meet. The criteria can be divided into four categories:

### STRUCTURED PRACTICAL EXPERIENCE

An organisation must:

- Have a strong commitment to provide appropriate work experience for membership of Chartered Accountants ANZ
- Establish a documented and regularly monitored work experience program for all candidates, undertaking their practical experience requirements for admission to Chartered Accountants ANZ. Some organisations may find it efficient to merge resources with another organisation to meet this requirement
- Conduct a reasonable mix of accounting work, so the candidates can obtain the appropriate range of practical experience. Some smaller organisations may co-operate with one another or with a larger organisation to ensure this requirement is fully met.

### QUALITY ASSURANCE PROCESSES

An organisation must have:

- An **ATE Coordinator** who is a person responsible for the program
- A **senior person**, or a **team of people** (depending on the size of the organisation), who is/are responsible for recruiting, developing and monitoring progress of accounting candidates
- **Internal procedures** to provide regular monitoring and supervision of candidates' practical experience. The procedures should include appropriate on-the-job training, counselling and development of professional skills and individual attributes such as:
  - Intellectual skills
  - Technical and functional skills
  - Personal skills
  - Interpersonal and communication skills
  - Organisational and business management skills.

### STAFF TRAINING AND DEVELOPMENT

An organisation must:

- Have appropriate resources and procedures to provide quality staff development, including training and
- Be committed to professional development and to ensuring all staff remain up-to-date technically and with matters affecting the wider economic community.

### OTHER RESOURCES

An organisation must:

- Provide time during and outside working hours to enable candidates to successfully complete the Chartered Accountants ANZ's professional competence program. PETH for ACA Candidates and Chartered Accountants Program for CA Candidates
- Provide sufficient access to members of Chartered Accountants ANZ who are willing to act as mentors (**Note:** mentors are encouraged to have no more than four trainees each at any one time)

## HOW DOES AN ORGANISATION APPLY FOR ATE STATUS?

An organisation wishing to become an ATE will complete an *Application to be an Approved Training Employer (ATE)* and email it to [assessment@charteredaccountantsanz.com](mailto:assessment@charteredaccountantsanz.com)

## WHO IS AUTHORISED ON BEHALF OF THE EMPLOYER TO APPLY FOR ATE STATUS?

A person who holds a senior position within the company for example: Partner, Senior Manager, Director, CFO, CEO, General Manager or Senior Executive.

## DO CURRENT EMPLOYERS WHO HAVE BEEN PREVIOUSLY ACCREDITED BY NZICA OR ICAA TO OFFER PRACTICAL EXPERIENCE IN THE PROGRAM NEED TO RE-APPLY?

**No.** Employers accredited by NZICA or ICAA are automatically recognised by Chartered Accountants ANZ.

## HOW DOES AN APPROVED TRAINING EMPLOYER MAINTAIN ATE STATUS?

Chartered Accountants ANZ will conduct an annual audit of ATE's. If you are required to complete a annual report confirming up to date information about the organisation and to demonstrate that an appropriate workplace training environment continues to exist, we will contact you directly.