

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 Mentored Practical Experience requirements. An organisation must obtain **Approved Training Employer (ATE)** status before a candidate can commence Mentored Practical Experience within that organisation. 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**.

## Section 1 – Company details

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

**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:

### Additional locations (if applicable)

Company name	<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"/>		
Town/City	<input type="text"/>	Postcode	<input type="text"/>
		Country	<input type="text"/>

Company name	<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"/>		
Town/City	<input type="text"/>	Postcode	<input type="text"/>
		Country	<input type="text"/>

Section 1 continued overleaf >

**ATE coordinator details** (Important: Provisional members cannot act as the ATE Coordinator. The ATE Coordinator does not need to be a full member.)

Title	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Miss	<input type="checkbox"/> Ms	<input type="checkbox"/> Other (please specify)	<input type="text"/>
Full name	<input type="text"/>				CA ANZ ID (if known)	<input type="text"/>
Position title	<input type="text"/>					
Phone (Business)	<input type="text"/>			Email	<input type="text"/>	

## Section 2 – Privacy statement and Declaration

### 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-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 CA ANZ's Privacy Policy and the important information contained in the Privacy Statement above.

### 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 Mentored Practical Experience requirements.

Section 2 continued overleaf >

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

- Provide structured practical experience by establishing a documented and regularly monitored work experience program for all candidates undertaking their Mentored Practical Experience requirements for admission to Chartered Accountants ANZ.
- Conduct a reasonable mix of accounting work, so the candidates can obtain the appropriate range of practical experience.
- Provide appropriate resources and procedures to provide quality staff development, including training.
- Provide quality assurance processes including nomination of person/s responsible for the program, recruiting, developing and monitoring the progress of candidates.
- Provide internal procedures for regular monitoring and supervision of candidates' Mentored Practical Experience including appropriate on-the-job training, counselling and development of Chartered Accountants ANZ's Mentored Practical Experience competencies.
- Be committed to professional development and to ensuring all staff remain up-to-date technically and with matters affecting the wider economic community.
- Display a professional approach to accounting with a supportive senior management attitude towards modern systems, compliance with best practice, and continuous improvement.
- 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 candidates each at any one time).
- Provide time during and outside working hours to enable candidates to successfully complete Chartered Accountants ANZ's Mentored Practical Experience.
- Provide reasonable access to the internet and the required computer resources to complete Chartered Accountants ANZ's Mentored Practical Experience.
- Approved Training Employers (ATEs) are responsible for maintaining appropriate public liability insurance that covers their employees undertaking Chartered Accountants ANZ's Mentored Practical Experience.

Please sign and date (ATE Coordinator)

Signature

Full name   
Date  / /  
(DD/MM/YYYY)

## Section 3 – Submitting your application form

### How to submit your application

Please return your completed application form (with accompanying attachments) to:

Email [assessment@charteredaccountantsanz.com](mailto:assessment@charteredaccountantsanz.com)

**Please note:** There is no fee for this 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)

## Application to be an Approved Training Employer (ATE)

# Guide to the form

Please read the information in this Guide to assist you in completing your application.

### What is an Approved Training Employer (ATE)?

An ATE is an organisation that meets Chartered Accountants ANZ's standards for offering the type of work experience that fulfils the Mentored Practical Experience 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:

#### 1. Structured practical experience

An organisation must:

- Have a strong commitment to providing work experience appropriate to 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.

#### 2. Quality assurance processes

An organisation must have:

- An **ATE** who is a person responsible for the program
- A **senior person**, or a **team of people** (depending on the size of the organisation), responsible for recruiting and developing accounting candidates and monitoring their progress
- **Internal procedures** to provide regular monitoring and supervision of candidates' Mentored Practical Experience. The procedures should include appropriate on-the-job

training, counselling and development of professional skills and individual attributes such as:

- professional ethics, values and attitudes
- self-management, learning and adaptive mindset
- collaboration and relationships
- communication
- critical thinking and decision making.

#### 3. Staff training and development

An organisation must:

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

#### 4. Other resources

An organisation must:

- Provide time during and outside working hours to enable candidates to successfully complete Chartered Accountants ANZ's Mentored Practical Experience and/or 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)* (this form) 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.

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### **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 ATEs. As a result of such an audit, your organisation may be requested to complete an annual report confirming or updating information on the organisation and demonstrating that an appropriate workplace training environment continues to exist. If this becomes necessary, we will contact your organisation directly.