

# Practical Experience Agreement



This agreement should be uploaded when completing the online Employment Details (EDF) form. Details regarding access to the online form can be found on page 2. A recognised mentor must be a full member with Chartered Accountants Australia and New Zealand (CA ANZ) or a member of a GAA body which CA ANZ has a full recognition agreement with. When a Provisional Chartered Accountant or Associate Chartered Accountant changes Mentor or Employer, they should complete the Practical Experience Agreement in order for us to verify whether they are in Approved Employment. Where you change employer and keep the same mentor, you must verify this external mentor relationship again by submitting

a new agreement, which must also be signed by an employer representative at your new place of work.

The [Practical Experience Guidelines](#) outline the roles and responsibilities of each party within the Practical Experience Program, and each of the signatories acknowledge they have read and understood the guidelines relevant to them.

It is important to note that where the current mentor arrangement is new, and your mentor is external from your place of work, we cannot backdate any practical experience period completed with an Approved or Recognised Training Employer (ATE or RTE) prior to receipt of this new agreement.

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

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Please complete **ALL** the sections below and submit the application to Chartered Accountants Australia and New Zealand (CA ANZ) (see page 2 for contact details). Please type your details into this form or write in **BLOCK CAPITALS**.

## Signed as acknowledgment of agreement

### Section 1 – Candidate details

Title  Mr  Mrs  Miss  Ms  Other

Given name/s (in full)  Family name

Company name

Company address  Suburb/City

State  Postcode  Country

Signature  Date  /  /

### Section 2 – Mentor details

Membership Number (must be completed by all mentors)

I am an external mentor (not working for the same employer as the candidate)

I am a member of a GAA body which CA ANZ has a full recognition agreement with

Name of GAA body (if applicable)

Title  Mr  Mrs  Miss  Ms  Other

Given name/s (in full)  Family name

Company name

Company address	<input type="text"/>	Suburb/City	<input type="text"/>
State	<input type="text"/>	Postcode	<input type="text"/>
Country	<input type="text"/>		
Duration of mentoring relationship	Start	<input type="text" value="DD / MM / YY"/>	End date (where applicable)
		<input type="text" value="DD / MM / YY"/>	Email
	<input type="text"/>		<input type="text"/>
Signature	<input type="text"/>		Date
		<input type="text" value="/"/>	<input type="text" value="/"/>

### Section 3 – Employer representative details

To be completed by an Approved or Recognised Training Employer representative where the mentor is not working for the same company as the candidate.

Full name	<input type="text"/>		
Position/Title	<input type="text"/>		
Email (business)	<input type="text"/>		
Phone (business)	<input type="text"/>	<input type="text"/>	Mobile
	<input type="text"/>	<input type="text"/>	<input type="text"/>
As the employer representative of	<input type="text"/>		Name of company
	<input type="text"/>		<input type="text"/>

I confirm that the candidate has been approved to use an external mentor.

Employer Representative's signature	<input type="text"/>	Date	<input type="text" value="/"/>	<input type="text" value="/"/>
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### Section 4 – Submitting your application form

#### HOW TO SUBMIT YOUR FORM

- Log into [MyAccount](#) from [charteredaccountantsanz.com](#) (under Quick links).
- Click on the Applications tab at the top of the dashboard and click on new application.
- Click on "Employment Details (edf)"

Complete or update any applicable fields in the online form before uploading the Practical Experience Agreement and Interim Mentor Report. The interim mentor report should be completed and submitted along with the online Employment Details (EDF) Form when you change mentor.

#### ANY QUESTIONS

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

<b>EMAIL</b>	<a href="mailto:service@charteredaccountantsanz.com">service@charteredaccountantsanz.com</a>	
<b>PHONE</b>	<b>AUSTRALIA</b>	1300 137 322 +61 2 9290 5660 (outside of Australia) 8AM – 6PM (AEST) Monday – Friday (excl. Public Holidays)
	<b>NEW ZEALAND</b>	0800 4 69422 +64 4 474 7840 (outside of New Zealand) 8AM – 6PM (NZ time) Monday – Friday (excl. Public Holidays)
<b>WEBSITE</b>	<a href="http://charteredaccountantsanz.com">charteredaccountantsanz.com</a>	

## 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 Tribunals or Appeal Tribunals (or as they may be reconstituted or renamed from time to time); 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) or on 1300 137 322. 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.

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