

Application to be an Approved Training Employer (ATE)

(to be completed by an authorised senior employer representative)



CHARTERED ACCOUNTANTS™
AUSTRALIA + NEW ZEALAND

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**. Please print in **BLOCK LETTERS**.

Section 1 – Company details

Name of company				CA ANZ ID (if known)
Street address	City/Town			
State	Postcode	Country		
Postal address	City/Town			
State	Postcode	Country		
Email				ACN/ABN
Phone	Website			

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:

Name of company				CA ANZ ID (if known)
Trading/ Business name				ACN/ABN
Street address	City/Town			
State	Postcode	Country		

Name of company				CA ANZ ID (if known)
Trading/ Business name				ACN/ABN
Street address	City/Town			
State	Postcode	Country		

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

Full name	Membership Number (if applicable)		
Position/Title			
Email	Phone (business)		

Section 2 – Declaration

I, the undersigned, being authorised on behalf of
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
meets Chartered Accountants ANZ's standards for offering the type of work experience that fulfils Chartered Accountants ANZ's Mentored Practical Experience requirements.

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

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 MPE@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

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

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. 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. 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



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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 Mentored 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:

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 Mentored 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 Coordinator** who is a person responsible for the program
- A **senior person**, or **team of people** (depending on the size of the organisation), responsible for recruiting and developing and accounting candidates and monitoring their progress
- **Internal procedures** to provide regular monitoring and supervision of candidates' Mentored Practical Experience. The procedures should include those for appropriate on-the-job training, counselling and development of professional skills and individual attributes relating to:
 - 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, and
- 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 the Chartered Accountants ANZ's Mentored Practical Experience and/or Professional Ethics (PETH) program (ACA Candidates) and/or Chartered Accountants Program (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

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. 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.