

Full and fellow membership reinstatement application form



How do we use your data?

All the information we hold concerning you will be processed by AAT in accordance with internal policies and current regulations.

The data will be used by AAT to administer our relationship with you and to provide you with information and services relevant to you. We won't, without your consent, supply your information to any third party except where such transfer is necessary as part of the activity you are undertaking, or where we're required to by law.

Find out more aat.org.uk/policies/privacy/fpn-professional-members

Please complete this form if you wish to apply to reinstate your full or fellow membership.

Please complete this form in BLOCK CAPITALS. You must complete all sections to avoid delaying your application.

If you have any questions about your application please call the Customer Service team on **+44 (0)20 3735 2468**. Lines are open 09.00 to 17.00 (UK time), Monday to Friday. Alternatively you can email customersupport@aat.org.uk

To reinstate your membership you need to:

- provide details of the continuing professional development activities you have undertaken in the past 12 months
- pay the reinstatement fee and appropriate annual membership fee, details of the fees can be found at aat.org.uk/fees

Part 1

In the first part of your application form, you'll need to provide:

- your personal details
- your reason for reinstating your membership
- your CPD details

1.1 Your details

AAT membership number

Mr Mrs Ms Miss Other *(please specify)*

First name(s)

Surname/last name

Address

Postcode

Country

Daytime telephone number

Mobile number

Email

Date of birth

1.2 Reason for reinstating your membership

Please tell us why you wish to reinstate your membership.

Oversight, did not realise membership fee was due/lapsed

In order to claim senior body exemption

Change in personal circumstances

Returned to an accountancy based role

Encouraged by employer

Employer paying membership fees

Other (*please give details*)

1.3 Continuing professional development (CPD)

You need to tell us about the CPD you have undertaken in the past 12 months to keep your skills and knowledge up to date.

Any learning, development, training or experience that helps you to remain competent to do your job or develop your career counts as CPD. This can include participation in workshops, going on training courses or attending conferences, learning new software packages, planned coaching from colleagues or specialists, as well as relevant reading, research and use of online resources.

Please provide a summary of your CPD activities including learning outcomes and any CPD plans you have below. Alternatively, please submit a copy of your CPD record with your application.

Part 2

In this part of your application you need to:

- confirm you are 'fit and proper' to be a licensed member
- complete your declaration
- arrange payment.

2.1 Fit and proper assessment

You must declare any information regarding any personal insolvency, corporate insolvency, criminal convictions, disciplinary sanctions, civil sanctions and other financial and legal issues that we need to be aware of. To read our 'fit and proper' requirements and the wider policy framework, please visit aat.org.uk/aatstandards

I have been subject to a disciplinary sanction made by another professional body	Yes	No
I have been declared bankrupt <i>(this includes corporate insolvency – when an individual is or was a director of an entity which is or was insolvent)</i>	Yes	No
I have been subject to a debt relief order	Yes	No
I have entered into an arrangement with my creditors <i>(this includes corporate insolvency – when an individual is or was a director of an entity which is or was insolvent)</i>	Yes	No
I have been convicted of a criminal offence which is not spent under <i>The Rehabilitation of Offenders Act</i>	Yes	No
I have been found guilty of a civil sanction <i>(examples of civil offences include those under the Companies Act, health and safety legislation or UK tax laws)</i>	Yes	No
I have been issued with a County Court Judgment	Yes	No

If you have answered 'Yes' to one or more of the statements above and have previously disclosed this information to AAT, please tick this box to confirm your circumstances have not changed.

If you have answered 'Yes' to any of the questions above, please provide supporting information below so it can be reviewed by our Professional Standards team.

2.2 Self-employed declaration

Self-employed work

I am providing self-employed accountancy or bookkeeping services to the public. Yes No

If you answered 'Yes', you will be required to apply for a licence. Find out more and download an application at aat.org.uk/licence

2.3 Your declaration

I confirm that the information in this application (or supporting it) is true and correct to the best of my knowledge and belief. I agree that:

- i. if at any time I become aware that any information in this application (or supporting it) is incorrect or if it changes in any way, I will notify AAT immediately
- ii. I will inform AAT, within 30 days, if I am subject to insolvency, a criminal conviction, a civil sanction, or a disciplinary finding by another professional body
- iii. if any information in this application (or supporting it) is incorrect, the application may be invalid and AAT's Council shall not be bound by any decision it has reached based on such information
- iv. AAT shall be entitled to suspend any membership granted on the basis of information in the application (or supporting it) whilst it investigates any reasonable concerns about my eligibility for such membership
- v. I may be liable to disciplinary action by AAT in respect of any information in this application (or supporting it) which is incorrect.

I agree that as part of any disciplinary investigation or proceedings carried out by AAT, it may use the information in this form, contact relevant third parties to request information, and disclose to governmental and other professional bodies: the alleged misconduct, the findings of its investigations, and the outcome of disciplinary proceedings. I agree that AAT may publicise disciplinary orders and the facts relating to them in accordance with the *Disciplinary Regulations* in force from time to time.

Signature

I agree that when necessary to fulfil its role as a supervisory authority pursuant to *The Money Laundering, Terrorist Financing and Transfer of Funds (Information on the Payer) Regulations 2017* or for the detection of and prevention of criminal activities, AAT may disclose information about me to the relevant Government agencies.

I understand fully how information provided on this form, or in other correspondence with AAT will be used, particularly any sensitive data pertaining to my health, ethnicity, criminal convictions or civil sanctions, disciplinary record and employment details.

I shall abide by the provisions of the *Articles of Association*, the *Fit and proper requirements*, the *Code of Professional Ethics*, the *AAT Regulations*, *Whistle-blowing guidance* and the *bye-laws*. Where I do not, I agree that AAT may take such action as is permitted in accordance with those Regulations and policies. I confirm that I will only use the designatory letters, 'MAAT' or 'FMAAT' while I hold this professional membership on the AAT register.

I agree that if I intend to provide bookkeeping services, accountancy services or trust or company services to clients within the UK, Channel Islands or Isle of Man during my membership, I will apply for a licence in accordance with the *Licensing Regulations* and will refrain from providing any services until such a time as I have received approval from AAT to do so. I understand I must also be registered for anti-money laundering supervision with the relevant supervisory authority within the jurisdiction where my business operates.

I agree to comply with AAT's *CPD* policy and will retain my CPD records for AAT's review for a period of at least five years. If I fail to comply or demonstrate such compliance when requested to do so, I understand this may lead to the removal of my membership from the Register.

Date

For more information about AAT's policies please refer to aat.org.uk/about-aat/professional-standards

2.4 Your communication preferences

Using your personal data

We'd like to contact you to offer free support, updates and news to boost your career and help you get the most from us. If you do not wish to receive any of these communications, please tick the appropriate boxes below. Even if you tick all of the options below to opt out, you'll still receive transactional messages relating to your account. You can update your preferences at any time through your MyAAT account.

Emails We'll send you emails packed full of support and resources to help you boost your career.

We usually send these around twice a month, or once a week if you're studying with us.

Telephone calls We'll call you about any queries you send us and you may also receive an occasional phone call to check you're happy with your services from us.

Text messages We'll occasionally send you text messages to let you know about important mail that is coming your way, such as certificates.

Post We'll send you occasional promotional information in the post.

Third party sharing of data

We would like to share your name and postal address with trusted third parties so they can provide you with relevant opportunities that may interest you. Do you agree to your information being shared in this way? You may change your preferences at any time through your MyAAT account.

Yes, I'm happy for my details to be shared

No, thank you

Your fee and renewal

Your fee

Details of all our fees and information on tax relief is available at [aat.org.uk/fees](https://www.aat.org.uk/fees)

Your one-off admission fee and annual membership fee must be paid by credit or debit card upon application.

You may be able to claim back up to 20% of your paid membership fees each year as tax relief.

The AAT Council reserves the right to change any fee on giving due notice. If your application is unsuccessful or withdrawn, and there is a debit on your account, we will put the balance of your application fees, after a retention fee equivalent to the admission fee has been deducted, towards the outstanding debt. We will refund any remaining money after these two deductions.

Your renewal

Your membership will start from the first day of the month your application is approved, and you will need to renew your membership on an annual basis. In order to renew, you'll need to pay your fee and complete your Annual Declaration.

Reduced fee application

You may be eligible for a reduction on your annual membership fee. To apply, please tick the relevant option based on your current circumstances. If you are eligible for a reduced membership fee this will be automatically applied. Details of our reduced membership fee can be found at [aat.org.uk/fees](https://www.aat.org.uk/fees)

I'm studying a relevant qualification in accountancy or finance.

A relevant qualification is an accounting or finance qualification, or one that includes a large amount of accounting or finance content. It must be studied at an educational institution (such as a college or university), or with a professional body such as ACCA, AIA, CAI, CIMA, CIPFA, IATI, ICAEW, ICAS or IFA. It can be studied on a full or part-time basis.

Terms and conditions

By ticking the box above, you confirm that you're currently studying for a course relevant to accountancy or finance.

Your application will be valid for the current period only. You'll need to reapply for a reduced fee and provide supporting documentation in subsequent years should you continue to study.

Any supporting documentation that you provide will be subject to AAT assessment. If AAT requests additional information that you're unable to provide, or deems your supporting documentation unsatisfactory, you'll be required to pay the full fee.

We'll update you on the progress of your reduced fee application within five working days.

I'm earning less than £7,000 per year (or local currency equivalent) from all my work (including both salaried and self-employed work)

Terms and conditions

By ticking the box above, you confirm that your total earnings (from both salaried and self-employed work) do not exceed £7,000 per year (or local currency equivalent).

Your application will be valid for the current period only. You'll need to reapply for a reduced fee and provide supporting documentation in subsequent years should you continue to earn less than £7,000 per year.

Any supporting documentation that you provide will be subject to AAT assessment. If AAT requests additional information that you're unable to provide, or deems your supporting documentation unsatisfactory, you'll be required to pay the full fee.

Your payment

Fees due upon application must be paid by credit or debit card. We accept Mastercard, Visa, Maestro and Electron cards but do not accept American Express or Diners cards.

By entering your card details below, you authorise AAT to take payment for the full amount required to process and approve your application. Alternatively, please leave this section blank and call us to pay over the phone.

All card details are handled in accordance with PCI compliance and destroyed confidentially after use.

Cardholder's name

Card number

Card type *(please tick one)*

CCV/CVC no. *(last three digits on reverse)* Issue no. *(if applicable)*

Mastercard

Visa

Visa Debit

Maestro

Start date

Expiry date

Electron

Cardholder's signature

Date

After your application has been approved, if you do not have a Direct Debit, you can set one up at aat.org.uk/directdebit

It's simple to arrange and allows you to split your fee in up to four monthly instalments.

Returning your form

Please return your completed form, along with payment (if applicable) to:

Email: applications@aat.org.uk

You will hear from us within five working days. If you do not receive confirmation of receipt of your application within this time, or you have any questions, please don't hesitate to contact us. Email us at customersupport@aat.org.uk or call us on **+44 (0)20 3735 2468**. Lines are open 09.00 to 17.00 (UK time), Monday to Friday.