

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 a professional reference
- 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

Personal 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

Reason for reinstating your membership

Please tell us why your membership lapsed. Please select the most appropriate answer.

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)

Your employment

Are you in employment?

Yes

No

If yes please provide details below.

Company/business name

Address

Postcode

Telephone number

Job title

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.

Please continue on a separate sheet if necessary or simply attach your CPD records to this application.

Your professional reference

You will need to provide a referee to confirm your suitability for membership.

Your referee:

- must have known you in a professional capacity for at least six months
- cannot be a family member.

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Find out more aat.org.uk/policies/privacy/fpn-reference-message

Information for professional referee

You have been selected by the applicant to provide a professional reference for AAT membership. Please complete the below if you consider the applicant to be suitable for AAT membership.

Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Ms <input type="checkbox"/>	Miss <input type="checkbox"/>	Other <i>(please specify)</i> <input type="text"/>
First name(s) <input type="text"/>				Surname/last name <input type="text"/>
Job title <input type="text"/>				Company/business name <input type="text"/>
Daytime telephone number <input type="text"/>				Email <input type="text"/>
Professional relationship to applicant* <input type="text"/>				Designatory letters of professional membership held <i>(if applicable)</i> <input type="text"/>

AAT membership number *(if applicable)*

**For example: Line manager, Head of Department, AAT licensed member, chartered/certified accountant (if applicant is self-employed).*

I can confirm that I have known the applicant for at least six months in a professional capacity.

I confirm that I am not related to the applicant.

I recommend the applicant for AAT membership.

Before adding your signature, please make sure that you have ticked the appropriate boxes above.

Signature

Date

Fit and proper assessment

If you tick 'Yes' for any of these statements, please send full written details with your application.

I have been declared bankrupt	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
I have been subject to a debt relief order	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
I have entered into an arrangement with my creditors	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
I have been convicted of a criminal offence which is not spent under <i>The Rehabilitation of Offenders Act</i>	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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	<input type="checkbox"/>	No	<input type="checkbox"/>
I have been issued with a County Court Judgment	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
I am subject to a disciplinary sanction made by another professional body	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

If you have ticked '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.

For guidance on AAT's regulations and policy framework please visit [aat.org.uk/aatstandards](https://www.aat.org.uk/aatstandards)

Self-employed work

I am providing self-employed accountancy and/or bookkeeping services to the public.	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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If you answered 'No', please tick this box to confirm you understand that you must hold an AAT licence if you deliver self-employed accountancy and/or bookkeeping services to the public and be registered with an appropriate supervisory authority within the meaning of the *Money Laundering Regulations 2007*.

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](https://www.aat.org.uk/licence)

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.

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 use the designatory letters, 'MAAT' only while I remain an AAT full member. I understand that the words 'full member' in this return shall refer to the capacity of member, as defined in the *Articles of Association*.

I agree that if I intend to deliver accountancy or bookkeeping services to clients or family/friends during the course of 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 to do so.

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.

Signature

Date

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

Consent

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

Application fees

In order to reinstate your membership, you must pay a reinstatement fee and your annual membership fee. Details of current fees are available at aat.org.uk/fees

Your membership will start from the first day of the month your reinstatement is approved. You will need to renew your membership on an annual basis from this date.

Tax relief

As AAT is an approved professional membership body, you may be able to claim tax relief against your annual subscription fees. This may allow you to claim back up to 20% of your paid membership fees each year. For full details on tax relief and making a claim, visit hmrc.gov.uk

Conditions

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 payment

Please indicate below how you would like to pay. We will process your payment on receipt of application.

Credit/debit card

The easiest way to pay is by credit or debit card. Either enter your card details in the section below or call us to pay over the phone. We accept all Mastercard, Visa, Maestro and Electron cards but do not accept American Express or Diners cards.

Cheque/postal order

All cheques and postal orders must be crossed A/C Payee only, and made payable to 'Association of Accounting Technicians'. Please also write your name and AAT membership number on the back and return it to us with your application.

Bankers draft

Please make your payment payable to AAT. Please also write your name and AAT membership number on the back and return it to us with your application. All drafts must be paid in Sterling and drawn on a UK bank.

Credit/debit card details

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

I authorise you to charge my credit/debit card with the amount of

£

Cardholder's name

Card number

Card type (please tick one)

Mastercard

Visa

Visa Debit

Maestro

Electron

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

Start date

Expiry date

Cardholder's signature

Date

We will process your payment on receipt of application.

Register to pay by Direct Debit

Once your application has been approved you can pay your future annual membership fees in instalments by setting up a Direct Debit. Please complete the online Direct Debit form at aat.org.uk/directdebit

You can choose to pay in up to four instalments.

Returning your form

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

Email: customersupport@aat.org.uk

Post: Customer Support, Association of Accounting Technicians 140 Aldersgate Street London EC1A 4HY

You will hear from us within ten 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.