

# Practical Experience Agreement

This agreement should be uploaded with an online Employment Details Form (EDF) or Provisional Membership application. When a Provisional Chartered Accountant or Associate Chartered Accountant changes mentor or employer, they need to submit a new Practical Experience Agreement.

Purpose of Practical Experience Agreement (PEA):

- To confirm a new mentor relationship; or
- To confirm the mentoring period dates of a past mentoring agreement when changing mentor and/or employer; or
- To confirm an ongoing mentoring relationship when moving to a new employer (external mentor).

The CA Program's Approved Employment and Mentoring requirements are outlined in the [CAP Practical Experience Policy](#). In accordance with these Practical Experience

requirements, by signing this agreement the candidate and mentor confirm that they have not nor will in the future enter into a fee for service mentoring agreement with each other.

If your mentor is external to your organisation, an employer representative will need to sign the agreement to confirm the organisation agrees to the external mentor relationship.

The [Practical Experience Guidelines](#) explain the roles and responsibilities of each party within the Practical Experience requirements of the CA 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 3 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	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Miss	<input type="checkbox"/> Ms	<input type="checkbox"/> Other	<input type="text"/>	
Given name/s (in full)	<input type="text"/>				Family name	<input type="text"/>	
Position title	<input type="text"/>						
Company name	<input type="text"/>						
Company address	<input type="text"/>					Suburb/City	<input type="text"/>
	State	<input type="text"/>	Postcode	<input type="text"/>	Country	<input type="text"/>	

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

Position title

Company name

Company address

Suburb/City

State

Postcode

Country

## Section 3 – Duration of mentoring relationship (to be completed and signed by the mentor)

**If the candidate is changing their place of employment; a new PEA needs to be completed to confirm the end date for the past place of work and complete a new PEA for the new employment location for a new or ongoing mentor relationship.**

Duration of mentoring relationship

Start

DD / MM / YY

End date (where applicable)

DD / MM / YY

Email

Signature

Date

## Section 4 – 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

Position/Title

Email (business)

Phone (business)

Mobile

As the employer representative of

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

Employer Representative's signature

Date

### HOW TO SUBMIT YOUR FORM

- Log into **MyAccount** from [charteredaccountantsanz.com](https://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.

### 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.

### ANY QUESTIONS

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

**EMAIL** [service@charteredaccountantsanz.com](mailto: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](https://charteredaccountantsanz.com)

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](https://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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