



Institute of Chartered Accountants of Jamaica

8 Ruthven Road, Kingston 10, JAMAICA W.I.
Tel: (876) 929-5869/929-6082 Fax: 929-9416
E-mail: icaj@cwjamaica.com
Website: www.icaj.org

**Please Attach
A Recent
Passport Size
Photograph**

APPLICATION FOR MEMBERSHIP

PLEASE COMPLETE ALL SECTIONS OF THIS FORM IN BLOCK CAPITALS.

1. PERSONAL INFORMATION

Mr./Mrs./Miss/Ms./Dr.....
(Surname) (Forenames)

University Degrees Date of Birth

Nationality of Origin Present Nationality

Next of Kin Telephone number in case of emergency:

2. ADDRESS

Residential Tele:.....

Business Address

Job title as specified by employer:

Company Name

Company Address

.....

Tele. No.(s) Fax. No..... E-mail

Please indicate (x) the address to which you wish your correspondence to be sent () Residential () Business

Please indicate (x) your current employment category (one only). If no category is applicable, detail circumstance on a separate sheet

() Public Practice () Industry () Commerce () Public Sector () other

3. PROFESSIONAL QUALIFICATIONS

Indicate the name(s) and category of any professional accounting body of which you are a member

Category Practising () Non Practising ()

Have you ever made any previous application to the Institute?

Academic qualification: ACCA CPA MSC UWI, MONA CGA OTHER (Member of scheduled society)

(Please Specify)

4. GRADUATES OF ICAJ/ACCA

Date of Registration as a Student Month and year in which final examination was passed:

5. DETAILS RELATING TO PERSONS WHO ARE NOT JAMAICAN

Period of Proposed residence in Jamaica From To

Reason(s) for requesting membership

Proposed Employment in Jamaica

6. REFEREES

Please list below the names of two members of ICAJ who are able to vouch from personal knowledge for your work experience and suitability for membership:

.....
.....
.....

7. FEES

Please enclose the application fee of JA\$6,800.00 which is not refundable.
Refer to application sheet insert for the categories of membership available and the relevant fees inclusive of G.C.T.

8. ENCLOSED DOCUMENTS

I enclose my employment history form () competence checklist () and certificate of approved accountancy training form () duly completed and signed.

9. DECLARATION

I declare that the information contained in this application is true, accurate and complete to the best of my knowledge and belief.

I have not been found guilty of a criminal offence, adjudged bankrupt or made an arrangement with creditors or subject to disciplinary proceedings by a professional organization. I also declare that there are no criminal charges or professional disciplinary proceedings pending against me.

I acknowledge that any statement contained therein which is known by me to be false may invalidate this application and any decision reached thereon by the Council of the Institute.

Date Signature of Applicant

FOR OFFICE USE ONLY

Date Rec'd	Approved by (Chairman)
Deposit \$
Receipt No
<u>COMMENTS</u>	
.....	
.....	
.....	

EMPLOYMENT HISTORY FORM

NAME OF APPLICANT:

Please list below your employment history (including your current post). If applicable, include any period of full-time study.

If your accountancy experience described below has not been continuous, please indicate any employment/unemployment/study etc. In the intervening periods.

All appointments comprising approved accountancy experience must be confirmed by letter from the employer (including present employer) on official or business notepaper specifying:

- (a) Date of commencement and termination
- (b) If employed part-time, state the number of hours per week

NAME OF FIRM/ORGANIZATION	JOB TITLE	FROM	TO

CERTIFICATION OF APPROVED ACCOUNTANCY TRAINING

NOTE: Kindly complete a separate form for each employer and/or Job title

NAME: _____

EMPLOYER: _____

ADDRESS: _____

DEPARTMENT: _____ JOB TITLE: _____

DATES FROM: _____ TO: _____

Experience area - (Please tick the appropriate box)

BASIC ACCOUNTING TECHNICAL ACCOUNTING FUNCTION MANAGEMENT OF STAFF/WORK

.....
TO BE COMPLETED BY EMPLOYER:

I certify that (Name of applicant) has satisfactorily completed the activities summarized below:

Signature: _____ Position held: _____

Name (Block capitals) _____ Professional status: _____

Organization: _____ Date: _____

Please add comments on attitude to work, ability to communicate, willingness to act on own initiative and to exercise judgement.

Summary of work undertaken and responsibilities: _____

COMPETENCE OF CHARTERED ACCOUNTANTS

Institute of Chartered Accountants of Jamaica

Name of the company/organization/practice in which the experience was obtained:

Address: _____

Name of Applicant _____

Name of supervising accountant/principal/manager _____ Signature _____

Qualification (if any) of supervising accountant/principal/manager
(e.g. Certified Accountant/Chartered Accountant): _____

Dates of employment/training: From _____ (month) _____ (year)

To _____ (month) _____ (year)

Competence Requirements for Membership

To be admitted to membership, you must be able to perform to the required standard:

-a minimum of 10 Elements of Technical Competence, including at least 5 of the 10 Key technical Elements - marked by the symbol \square

- all 5 Mandatory Management Elements - marked by the symbol \diamond

A minimum of three years acceptable, supervised, practical experience is required overall \diamond

EXCELLENT
 VERY GOOD
 GOOD
 FAIR
 POOR
 (1) (2) (3) (4) (5) N/A

				EXCELLENT	VERY GOOD	GOOD	FAIR	POOR		
				(1)	(2)	(3)	(4)	(5)	N/A	
KEY ROLE 1 Financial And Regulatory Obligations	UNIT 1A Prepare financial and related information to meet internal needs and external obligations	ELEMENT 1A.1	Collect and process financial and related information to meet internal needs and external obligations.	\square						
		ELEMENT 1A.2	Analyze and appraise financial and related information.	\square						
		ELEMENT 1A.3	Produce financial and other statements and accounts and reports to clients/ management	\square						
	UNIT 1B Develop and implement financial and related information systems	ELEMENT 2B.1	Advise on the nature, functions and purpose of financial and related information systems							
		ELEMENT 2B.2	Determine appropriate financial and related information systems to meet client/organizational requirements.							
		ELEMENT 2B.3	Design and develop financial and related information systems.							
		ELEMENT 2B.4	Introduce, monitor, maintain and modify financial and related information systems.							
	UNIT 1C Advise and support others in meeting their regulatory obligations	ELEMENT 2C.1	Advise others of their regulatory obligations and how these can be met							
		ELEMENT 2C.2	Assist and support clients/management in meeting their/its regulatory obligations.							
KEY ROLE 2 Taxation	UNIT 2A Advise clients/ management on their/ the organization tax obligations. Implications and alternatives	ELEMENT 2A.1	Advise clients/management of their/the organization's tax obligations and ways of meeting them.							
		ELEMENT 2A.2	Advise clients/management of the effect which charges will have on their/ the organization's tax obligations.							
		ELEMENT 2A.3	Advise clients/management with tax planning to optimize their/the Organizations' tax position.							
	UNIT 2B Compute and agree the tax due	ELEMENT 2B.1	Complete the tax payable by clients/the organization.	\diamond						
		ELEMENT 2B.2	Negotiate and intermediate for clients/the organization with the taxation authorities.							

KEY ROLE 3 Business Planning and Control	UNIT 3A Assist clients/ management to set their/its strategy and objections and review business performance	ELEMENT 3A.1	Assist clients/management to formalise their /its thinking concerning current and future business direction and strategy.		1	2	3	4	5	N/A
		ELEMENT 3A.2	Assist clients/management to set short-term business objectives and methods for achieving them.	Ⓚ						
		ELEMENT 3A.3	Assist clients/management to review and evaluate information on business performances.	Ⓚ						
	UNIT 3B Assist clients/ management in the planning and deployment of their/the organization's financial assets	ELEMENT 3B.1	Assist clients/management to formalate their/its financial objectives and methods of meeting them.							
		ELEMENT 3B.2	Advise clients/management on capital expenditure decisions							
		ELEMENT 3B.3	Manage assets to assist clients/management to meet their/its business strategy and objectives.							
	UNIT 3C Assist clients/ management to monitor and control the success of the organization in meeting its objectives	ELEMENT 3C.1	Determine the cost and value of actual or potential activities							
		ELEMENT 3C.3	Analyse and evaluate financial and related information for business monitoring and control purposes	Ⓚ						
	UNIT 3D Examine and evaluate the adequacy effectiveness and quality of operations	ELEMENT 3D.1	Plan the scope and content of an evaluation							
		ELEMENT 3D.2	Collect, analyse and document evidence gained from an internal evaluation							
		ELEMENT 3D.3	Advise and consult with personnel on the reports of an internal evaluation							
	KEY ROLE 4 Audit	UNIT 4A Plan, control and record audit work	ELEMENT 4A.1	Obtain background data for the purpose of audit planning.						
ELEMENT 4A.2			Plan and allocate resources to meet audit objectives							
ELEMENT 4A.3			Design audit programme and working schedules for the recording and storage of evidence	Ⓚ						
ELEMENT 4A.4			Monitor and maintain the recording and storage of evidence against audit requirements							
UNIT 4B Evaluate the truth and fairness/ accuracy of an organization's financial		ELEMENT 4B.1	Determine and test the organization's accounting system and the information which it produces	Ⓚ						
		ELEMENT 4B.2	Evaluate the financial information produced by an organization							
		ELEMENT 4B.3	Review financial statements against the evidence collected in the audit process							
UNIT 4C Report on the truth and fairness / accuracy of an organization's financial statement		ELEMENT 4C.1	Advise and consult with appropriate personnel on audit concerns							
		Public Practice only ELEMENT 4C.2	Prepare a formal audit report to express and opinion on the truth and fairness of financial statements	Ⓚ						
KEY ROLE 5 Management		UNIT 3D Examine and evaluate the adequacy effectiveness and quality of operations	ELEMENT 5A.1	Establish and agree the work to be undertaken						
	ELEMENT 5A.2		Plan and allocate resources to achieve work objectives							
	ELEMENT 5A.3		Monitor, maintain and adopt services to meet objectives							
	UNIT 5B Contribute to the recruitment, selection and development of personnel,	ELEMENT 5B.1	Contribute to the definition of personnel requirements and specifications							
		ELEMENT 5B.2	Contribute to the recruitment and selection of personnel to meet organizational objectives							
		ELEMENT 5B.3	Identify and review and development objectives and opportunities for individuals							
		ELEMENT 5B.4	Develop oneself within the work environment	Ⓜ						
	UNIT 5C Establish and maintain professional relationships with colleagues, clients and others	ELEMENT 5C.1	Establish and maintain professional relationships with clients and other external contacts	Ⓜ						
		ELEMENT 5C.2	Establish and maintain confidential relationships with colleagues	Ⓜ						
	UNIT 5D Monitor and maintain the safety and security of the environment and its contents	ELEMENT 5D.1	Monitor and maintain the confidentiality and security of information	Ⓜ						
ELEMENT 5D.2		Contribute to maintaining the health, safety and security of the working environment.	Ⓜ							

Credit is due to ACCA for the contents of this form

Signature of Employer/Supervisor

CERTIFICATION OF APPROVED ACCOUNTANCY TRAINING

NOTE: Kindly complete a separate form for each employer and/or Job title

NAME: _____

EMPLOYER: _____

ADDRESS: _____

DEPARTMENT: _____ JOB TITLE: _____

DATES FROM: _____ TO: _____

Experience area - (Please tick the appropriate box)

BASIC ACCOUNTING TECHNICAL ACCOUNTING FUNCTION MANAGEMENT OF STAFF/WORK

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Competence Requirements for Membership

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- all 5 Mandatory Management Elements - marked by the symbol M

A minimum of three years acceptable, supervised, practical experience is required overall M

EXCELLENT
 VERY GOOD
 GOOD
 FAIR
 POOR
 (1) (2) (3) (4) (5) N/A

				EXCELLENT	VERY GOOD	GOOD	FAIR	POOR		
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		ELEMENT 1A.2	Analyze and appraise financial and related information.	K						
		ELEMENT 1A.3	Produce financial and other statements and accounts and reports to clients/ management	K						
	UNIT 1B Develop and implement financial and related information systems	ELEMENT 2B.1	Advise on the nature, functions and purpose of financial and related information systems							
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	UNIT 3D Examine and evaluate the adequacy effectiveness and quality of operations	ELEMENT 3D.1	Plan the scope and content of an evaluation							
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		ELEMENT 5D.2	Contribute to maintaining the health, safety and security of the working environment.	Ⓜ						

Credit is due to ACCA for the contents of this form

Signature of Employer/Supervisor

ICAJ MEMBERSHIP APPLICATION REVIEW CHECKLIST

Name of Applicant: Application Date Review Date

		Secretariat Review	Bye-Law Reference	Reviewer's Signature and check mark #1	Reviewer's Signature and check mark #2	Reviewer's Signature and check mark #3
1	Qualifications confirmed and supported by documents submitted with application, (Certificates, transcript, notification from institution)					
2	Required 3 year's continuous experience					
3	Application made within 3 years of passing final exam and acquiring the necessary experience. (Msc., CPA, ACCA, CGA)					
4	Approved Accountancy Experience					
5	Two unambiguous Recommendations for membership received					
6	References acceptable - members of the Institute.					
7	Competency Checklist completed and signed.					
8	Competency checked in line with experience/jobs previously held.					
9	Five "M" competencies checked.					
10	At least 5 "K" competencies checked.					
11	Interview recommended (yes /no)					
12	Photograph submitted with application.					
13	Code of Ethics Test passed					
14	Payment of fees					
15	Attended orientation session					

Remarks:

.....
 (Note: Reason for recommendation of interview must be documented above)