

The Actuaries Institute accepts applications for a range of membership categories – including accredited, affiliate, and students.

## Points to note

- a) Applicants should visit [www.actuaries.asn.au](http://www.actuaries.asn.au) for full details of our eligibility criteria and membership fee information
- b) All sections marked with \* must be answered
- c) The collection, use and disclosure of personal information is subject to our Privacy Policy, which is available at [www.actuaries.asn.au/utills/privacy-policy](http://www.actuaries.asn.au/utills/privacy-policy)
- d) Processing your application **can take up to two weeks**
- e) Please take care when completing this form as incomplete, incorrect and illegible applications will take longer to process
- f) If you are applying for Student membership, the Institute will only accept original or scanned certified copies of academic records and/or proof of university enrolment to be submitted with this application. Only scanned certified copies are accepted if you are submitting your application via email. A scanned certified copy is a document that has been signed by a Justice of the Peace (JP)

## Instructions for completing this form

- A. Tick the appropriate membership category for which you are applying
- B. Complete sections 1, 4, 7 and specific additional sections as outlined below

Membership Category	Additional sections to be completed
<input type="checkbox"/> <b>Accredited</b> Actuaries who have qualified overseas can apply for Accredited Membership. Full details of our Accredited Membership Policy can be found on page 9.	<ul style="list-style-type: none"> <li>- section 2</li> <li>- section 5.1, 5.2 and 5.3</li> <li>- section 6.3</li> </ul> <p>Applicants must read the Policy Statement on page nine. Applicants must attach a certified copy of their Fellowship Certificate.</p>
<input type="checkbox"/> <b>Associate</b> Associate members who have qualified through examination with either the Actuarial Society of South Africa or the Canadian Institute of Actuaries.	<ul style="list-style-type: none"> <li>- section 2</li> <li>- section 5.1 and 5.2</li> <li>- section 6.1A</li> </ul> <p>Applicants must attach a certified copy of their Associate Certificate.</p>
<input type="checkbox"/> <b>Affiliate</b> An Affiliate Member has a keen interest in the actuarial profession or the education, professional development or public policy program of the Institute. An Affiliate Member may also be a member of another actuarial organisation that has a mutual recognition agreement with the Institute, or is a member of the International Actuarial Association Profession.	<ul style="list-style-type: none"> <li>- section 2</li> <li>- section 6.1</li> <li>- for members of an actuarial organisation: section 5.1.</li> </ul> <p>Applicants must attach a certified copy of their academic transcript.</p>
<input type="checkbox"/> <b>Student</b> A Student Member is a new member who wants to enrol in the Institute's education program. If you are applying as a full-time student, you are eligible for a subsidised membership when proof of enrolment is provided.	<ul style="list-style-type: none"> <li>- section 2 or 3</li> <li>- section 6.2</li> </ul> <p>Applicants must attach a certified copy of their academic transcript, and proof of full-time enrolment (if applicable).</p>

**Section 1: Personal and contact details\* ( to be completed by all applicants )**

 Title  Mr  Mrs  Miss  Ms  Dr  Other (please specify)   
 Given Name  Middle Name(s)   
 Family Name  Preferred Name 
**Business Address**

 Position / Title   
 Organisation   
 Address   
 Town / Suburb  State  Post Code   
 Country   
 Telephone  Work Email 
**Billing Address (if different from above)**

 Address   
 Town / Suburb  State  Post Code   
 Country 
**Home Address**

 Address   
 Town / Suburb  State  Post Code   
 Country   
 Telephone  Fax   
 Mobile  Personal Email   
 Gender  Male  Female Date of Birth    (dd|mm|yyyy)  
 Nationality   
 Languages spoken (other than English) 
**Preferred mailing address**
 Business  Billing  Home

**Preferred email address**
 Work  Personal

**Reason for application** (if applicable):

 Part I distance examinations enrolment  Part III enrolment

 Please note, you can submit your [enrolment form](#) with your membership application form.

**Section 2: Qualifications**
**OTHER ACADEMIC QUALIFICATIONS WITH POST NOMINALS**

 List all tertiary qualifications completed, years attained and the name and country of the educational institution attended. **Verified copies or original transcripts must be enclosed with this application. Scanned, certified copies are acceptable if you are submitting your application via email.**

 Qualification  Abbreviation   
 Date Completed  Institution   
 Country

**Section 3: Education Program ( to be completed by applicants for Student membership only )**

**Section 3.1: ( to be completed by applicants currently studying )**

I am currently enrolled as a full-time student in an actuarial studies course at:

- |   |  |                 |
|---|--|-----------------|
| <input type="checkbox"/> Australian National University               | <input type="checkbox"/> Curtin University of Technology | Bond University |
| <input type="checkbox"/> Macquarie University                         | <input type="checkbox"/> University of Melbourne         |                 |
| <input type="checkbox"/> University of New South Wales                | <input type="checkbox"/> Monash University               |                 |
| <input type="checkbox"/> Other (please specify): <input type="text"/> |  |                 |

Degree being studied:

**Section 3.2**

**Please complete the following section if you have:**

1. Completed your bachelor degree in actuarial studies **and**
2. Graduated from one of the Institute's accredited universities **and**
3. Given the University permission to mail the Institute your eligibility for exemption letter

Subject	Eligible for exemption	University that recommended the exemption	Year course completed
CT1 Financial Mathematics	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
CT2 Finance and Financial Reporting	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
CT3 Probability & Mathematical Statistics	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
CT4 Models	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
CT5 Contingencies	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
CT6 Statistical Methods	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
CT7 Economics	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
CT8 Financial Economics	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

If you have completed any of the above subjects through the Institute and Faculty of Actuaries, you may be eligible for a direct credit transfer at no cost. To apply, submit an Application for Credit Transfer available at <http://www.actuaries.asn.au/studying-with-the-institute/part-i>

If you have completed your degree from a non-accredited university and wish to apply for an exemption you will need to submit an Application for Exemption available at <http://www.actuaries.asn.au/studying-with-the-institute/part-i>

**Section 3.3**

**If you have completed Part II comprising Part IIA - The Actuarial Control Cycle, and Part IIB – Investment and Asset Modelling, you may be eligible for exemption from Part II.**

I completed the Part II course in  at

**Section 4: Practice Areas\*** ( to be completed by all applicants )

To allow us to more closely tailor our services to your needs, please rank your primary practice area(s) or area(s) of interest as 1, 2 and/or 3 only.

Primary Practice Area	Rank
Banking	<input type="checkbox"/>
Data Analytics	<input type="checkbox"/>
Education	<input type="checkbox"/>
Environment and Energy	<input type="checkbox"/>
Finance	<input type="checkbox"/>
General Insurance	<input type="checkbox"/>
Health	<input type="checkbox"/>
Information Technology	<input type="checkbox"/>
Investment and Funds Management	<input type="checkbox"/>
Life Insurance	<input type="checkbox"/>
Management	<input type="checkbox"/>
Other Business	<input type="checkbox"/>
Reinsurance	<input type="checkbox"/>
Risk Management	<input type="checkbox"/>
Superannuation and Employee Benefits	<input type="checkbox"/>
Wealth Management	<input type="checkbox"/>

**Employment Status**

Student – Part-time	<input type="checkbox"/>
Student – Full-time*	<input type="checkbox"/>
Employed	<input type="checkbox"/>
Not working	<input type="checkbox"/>
Retired	<input type="checkbox"/>

\*If you have chosen Student - Full-time you will need to attach proof of current enrolment from your university. The proof of current enrolment document should show your full name, the name of your university, the name of the course you are studying and the enrolled subjects for the current year. It can be one of the following:

1. a signed letter on university letterhead confirming your name, course and full-time enrolment for the current year
2. a summary of full time enrolment stamped and signed by your university

The membership team will **not accept** Confirmation of Enrolment (CoE) from the Department of Education and Training or student photo ID.

**For members receiving reduced subscription fees only**

Members who select this option are reminded of section 4.2.1 of the Code of Professional Conduct: A member must act with integrity, honesty and due care, and in a manner that seeks to uphold the reputation of the profession.

I confirm that, for the current financial year, I expect that my total taxable income will be less than \$70,000. The Institute may seek to verify this at a later date.

Signature

**Section 5: Required qualification information**
**Section 5.1: ( to be completed by Fellows or Associates of the following )**
**I am currently a financial Fellow of:**

- Actuarial Society of South Africa (ASSA)  
 Canadian Institute of Actuaries (CIA)  
 Casualty Actuarial Society (CAS) Institute  
 of Actuaries of India (IAI)  
 Institute of Actuaries of Japan (IAJ)  
 Institute and Faculty of Actuaries (IFOA)  
 New Zealand Society of Actuaries (NZSA)  
 Society of Actuaries (SOA)  
 Society of Actuaries in Ireland (SAI)  
 Other \_\_\_\_\_

 I attained this status in 
**I am currently a financial Associate of:**

- Actuarial Society of South Africa  
 Canadian Institute of Actuaries

 I attained this status in 
**Section 5.2: ( to be completed by applicants for Accredited or Associate membership )**
**I qualified as a Fellow by examination through the:**

- Actuarial Society of India (IAI)  
 Actuarial Society of South Africa (ASSA)  
 Casualty Actuarial Society (CAS)  
 Canadian Institute of Actuaries (CIA)  
 Institute and Faculty of Actuaries (IFOA)  
 Society of Actuaries (SOA)  
 Society of Actuaries in Ireland (SAI)  
 Other \_\_\_\_\_

 I attained this status in 
**I qualified as an Associate by examination through the:**

- Actuarial Society of South Africa  
 Canadian Institute of Actuaries

 I attained this status in 
**Section 5.3: ( to be completed by applicants for Accredited membership )**
**I completed a recognised Professionalism Course within the last five years conducted by:**

 Name of the organisation 

 Date\*  |  |  (dd | mm | yy) at (location, city) 

 Signature 

\*Please note, Professionalism Courses completed more than five years ago will not be considered. To complete the Professionalism Course, please see the following page on our website:

<http://www.actuaries.asn.au/studying-with-the-institute/professionalism-course>.

Alternatively, you can complete one of the following recognised Professionalism Courses:

- Institute and Faculty of Actuaries (IFoA) Professional Skills Course (can be completed online);
- Society of Actuaries (SoA) Fellowship Admissions Course; and
- Actuarial Society of South Africa's (ASSA) Fellowship Professionalism Course.

**Section 6: Referees\***

To be completed by two referees.

**Section 6.1: ( to be completed by Associate or Affiliate membership applicants, please complete A or B )**

**A. Associate or Affiliate applicants who are members of other actuarial organisations that hold a mutual recognition agreement with the Institute, or who are members of the International Actuarial Association.**

Name of the organisation

Membership status

**A referee can be anyone over the age of 18 years who is not a member of the applicant's family and who has known the applicant for at least 12 months.**

We the undersigned consider that the applicant is suitable for membership of a professional body and is a person who could be relied upon to maintain the standards of the Institute.

**Referee 1**

Title  Name

Address

Town/ Suburb  State  Post Code

Country  Email

Occupation

Date  |  |  (dd|mm|yy) Signature

**Referee 2**

Title  Name

Address

Town/ Suburb  State  Post Code

Country  Email

Occupation

Date  |  |  (dd|mm|yy) Signature

**B. Affiliate applicants who hold professional qualifications in a related field and who are nominated by two Fellows of the Institute.**

We the undersigned consider that the applicant is suitable for affiliate membership with the Institute and is a person who could be relied upon to maintain the standards of membership of the Institute.

**Referee 1**

Title  Name

Address

Town/ Suburb  State  Post Code

Country  Email

Date  |  |  (dd|mm|yy) Signature

**Referee 2**

Title  Name

Address

Town/ Suburb  State  Post Code

Country  Email

Date  |  |  (dd|mm|yy) Signature

**Section 6.2: (to be completed by Student membership applicants)**

**A referee can be anyone over the age of 18 years who is not a member of the applicant's family and who has known the applicant for at least 12 months.**

We the undersigned consider that the applicant is suitable for membership of a professional body and is a person who could be relied upon to maintain the standards of the Institute.

**Referee 1**

Title  Name

Address

Town/ Suburb  State  Post Code

Country  Email

Occupation

Date  |  |  (dd|mm|yy) Signature

**Referee 2**

Title  Name

Address

Town/ Suburb  State  Post Code

Country  Email

Occupation

Date  |  |  (dd|mm|yy) Signature

**Section 6.3: (to be completed by Accredited membership applicants)**

**To be completed by two Fellows of the Institute.**

We the undersigned consider that the applicant is suitable for membership of a professional body and is a person who could be relied upon to maintain the standards of the Institute.

I (Name)

and I (Name)

certify that the applicant has worked and resided in Australia (or New Zealand, for Fellows of the New Zealand Society of Actuaries) for at least six months, and in our view has the requisite actuarial experience and knowledge of Australian conditions. Accordingly we recommend that the applicant be accepted as an Accredited Member of the Actuaries Institute.

Date  |  |  (dd|mm|yy) Signature

Date  |  |  (dd|mm|yy) Signature

**Statement of Responsibility (to be completed by one of the nominating Fellows)**

I (Name)

am satisfied that the above named applicant understands the Actuaries Institute's Code of Professional Conduct and all Professional Standards and mandatory Guidance Notes.

Date  |  |  (dd|mm|yy) Signature

**Section 7: Declaration\*** ( to be completed by all applicants )

- Have you, at any time, been convicted of an indictable offence or are you currently charged with an indictable offence?  YES  NO
- Have you, at any time, been found to have acted fraudulently or dishonestly by any court or tribunal of competent jurisdiction in Australia or elsewhere for an offence of any kind?  YES  NO
- Have you ever been subject to disciplinary action by a statutory, professional or other body in respect of your professional capacity?  YES  NO
- Are you presently under any sequestration or bankruptcy order of the court or have you presently made an assignment for the benefit of creditors?  YES  NO

**If you have answered "YES" to any of the above please attach details (including details of the outcome)**

I hereby apply for membership of Actuaries Institute (the Institute). I understand that I have no voting rights of the Institute unless I become a Fellow.

I agree as a condition of membership to be bound by the provisions of the Constitution of the Institute and its Code of Professional Conduct and all Professional Standards and mandatory Guidance Notes.

I agree to the Institute's collection, use and disclosure of my personal information in accordance with the Institute's Privacy Policy available at <http://actuaries.asn.au/utis/privacy-policy>, including:

- the use of my preferred mailing address (as provided to the Institute) for receipt of information from the Institute or via its appointed mailing house;
- the inclusion of my business contact details (as provided to the Institute) on the password protected Members' section of the Institute website for use by other Members;
- the use of my nominated preferred mailing address (as provided to the Institute) by any international actuarial association with whom I hold a subscription through the Institute and agree to the Institute disclosing these details and my membership of the Institute to those associations; and
- the use of my full name and preferred state/country to the New Members welcome message published on the website and Actuaries Digital on joining.

I give the Institute permission to contact another actuarial association to obtain:

- confirmation that I am a Fellow or Associate of that body in good standing; and
- details of any disciplinary actions taken against me.

Applicant's Signature  Date  |  |

**Payment details\*** ( to be completed by all applicants )

**Total Payment Amount \$**

Please check the fee sheet for the applicable fee <https://www.actuaries.asn.au/Library/Membership/2017/FullYearFeeSheet201718.pdf>

Exemptions can also be paid at this time by submitting a payment form <http://www.actuaries.asn.au/Library/Education/2016/ExemptionPaymentForm.pdf>

- EFT or BPAY (an invoice will be sent to your email address displaying the Institute's bank details)
- Cheque (payable to the Institute of Actuaries of Australia)
- VISA  MASTERCARD  AMEX  EFTPOS (*in - person option only*)
- VISA/MASTERCARD incurs 1.31% fee  
AMEX incurs 2.78% fee

Name on card

Card Number  Expiry Date  |

Cardholder Signature  Date  |  |



## ACCREDITED MEMBERSHIP POLICY

The Actuaries Institute currently holds mutual recognition agreements with the following actuarial associations:

Actuarial Society of South Africa (ASSA)  
Casualty Actuarial Society (CAS)  
Canadian Institute of Actuaries (CIA)  
Institute and Faculty of Actuaries (IFA)  
Institute of Actuaries of India (IAI)  
Society of Actuaries (SoA)  
Society of Actuaries in Ireland (SAI)

Fellows who have qualified through examination at one of these associations may be accepted as Accredited Members of the Actuaries Institute if they satisfy the following conditions:

- (1) Are a current financial Fellow of one of the above-mentioned bodies.
- (2) Have been resident and working in Australia for at least six months and gained suitable experience in local actuarial practice.
- (3) Have completed a recognised Professionalism Course within the previous five years (or earlier at the discretion of the Council). For this purpose, recognised Professionalism Courses include those of the Actuaries Institute and the above-mentioned associations.
- (4) One of the Fellows signing their nomination form must be satisfied that the applicant understands the Actuaries Institute Code of Professional Conduct, and all Professional Standards and Mandatory Guidance Notes.

Fellows of the New Zealand Society of Actuaries may work and reside in either Australia or New Zealand.

### **Transferring of Accredited Membership to Fellowship**

Fellows of the above-mentioned associations who have been accepted as Accredited Members may transfer to become a Fellow of Actuaries Institute (FAIA) after a waiting period of six months, during which time they must work and reside in Australia. You will need to complete the [Transfer from Accredited Member to Fellow](#) as this is not done automatically.

Fellows of the New Zealand Society of Actuaries may reside and work in Australia or New Zealand during the six month waiting period.

Members of other actuarial associations are required to satisfy a waiting period of three years, during which time they must reside and work in Australia and maintain current financial membership as a Fellow of their overseas body.

**Guidelines for Fellows from actuarial associations without a Mutual Recognition Agreement (Non-MRA) to join as an Accredited Member.**

Fellows who have qualified through actuarial associations that have not signed a Mutual Recognition Agreement (MRA) with the Institute may apply for special consideration for accredited membership.

Such applications will be considered on a case-by-case basis by Council on the recommendation of the Institute's Chief Executive Officer.

Generally, an applicant would have:

- been residing and working in Australia and/or New Zealand and have done so for at least three years to gain suitable experience in local actuarial practice;
- completed a recognised Professionalism course within the previous 12 months; and
- maintained the currency of their membership of the relevant overseas actuarial association.

Applications from persons without such qualification are still welcomed.

Whilst not mandated, the following types of supporting documentation would be of assistance to the Chief Executive Officer and Council in considering an application:

- a letter to Council illustrating work experience and any other achievements; evidence of actuarial education qualification; and
- supporting references from one or more senior Fellows of the Actuaries Institute (for example, a Fellow who is an Appointed Actuary or working in a senior actuarial role), commenting on the applicant's actuarial experience and knowledge of Australian conditions.

Unsuccessful applications may be resubmitted in 12 months time, provided any requirements stipulated by Council have been met, however the Chief Executive Officer or Council may request further information.

**Institute of Actuaries of Australia**

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