

## 2023 FCAQ APPLICATION FOR ACCREDITED MEMBERSHIP

### (Non-Practising)

This application form should be read in conjunction with the FCAQ Membership Policy 2022 Version 1 available on the FCAQ website. To assist in the processing of application for membership please note the following:

1. **If the non-practising member wishes to practise financial counselling, the member will need to submit an Accredited Membership (Practising) application prior to seeing clients.**

2. The completed membership application form, together with all supporting documentation, is to be emailed to [membership@fcaq.org.au](mailto:membership@fcaq.org.au) with the following in the subject title "<surname> accredited membership non-practising". FCAQ will only accept forms that are sent by email to above email address.

3. FCAQ's membership year runs from 1st January until 31st December and it is the member's responsibility to ensure that a properly completed membership application form, together with all necessary supporting documents, is submitted well before 1st January, thus allowing time to resolve any queries or requests for clarification from FCAQ.

4. Supervision:

An Accredited Member (Non-Practising) will not require professional supervision throughout the membership year.

5. Continuing Professional Development (CPD):

An Accredited Member (Non-Practising) must complete 20 points of CPD per calendar year with a minimum of one session from each of the following categories: technical, skills and ethics. For a more detailed explanation of these categories, please refer to the CPD section below.

6. The FCAQ CPD Tracker for 2022 is to be submitted with this application.

7. Assessment Process:

If your membership is approved by FCAQ, you will receive:

(a) A notice in writing of membership acceptance, and

(b) a tax invoice for the fee, which is payable within 14 days of notification.

***No fees are to be paid to FCAQ until you have been advised that all membership requirements have been met and a tax invoice has been provided.***

If you are not approved for membership, you will be advised in writing that:

(c) Your membership application has been declined, together with the reason, or

(d) your membership application has been declined because further information is required to support your application.

8. Fees:

The annual fee for Accredited members (Non-Practising) for 2023 is **\$155** per calendar year or part of that year.

New membership commences only when your payment has been received and receipted by FCAQ.

**MEMBER DETAILS (please complete all required \* information)**

<b>Name: *</b>	
<b>Date of Birth: *</b>	
<b>Mailing address: *</b>	
<b>Email address: *</b>	
<b>Phone number: *</b>	

**ORGANISATION/EMPLOYER**

*(If you work for multiple agencies, please print and complete this page for each agency):*

<b>Agency Manager's name: *</b>	
<b>Agency Manager's email: *</b>	
<b>Organisation/Agency phone: *</b>	
<b>Organisation/Agency Address: *</b>	
<b>Your current position title: *</b>	
<b>Date commenced in this role: *</b>	

**Pre-requisites in connection with your employer (or organisation you volunteer for):**

<p><b>Are you employed in the finance industry, or does your employer hold a credit licence?</b></p> <p><input type="checkbox"/> No <input type="checkbox"/> Yes - you do not meet membership eligibility</p>
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Which organisations or government departments fund your position? \_\_\_\_\_

**Eligibility for Accredited (Non-practising) Membership**

**1. Working, or volunteering as a Financial Counsellor**

Are you primarily working or volunteering as a Financial Counsellor, or Supervisor as per your position description?

No  Yes ► you may not meet membership eligibility – please discuss with FCAQ staff.

## 2. Diploma of Financial Counselling CHC51115 or Diploma of Community Services (Financial Counselling) CHC52108

Have you completed the above Diploma?

Yes

No - you may not meet membership eligibility, please contact FCAQ staff.

Has a copy of your completed Diploma certification been provided to FCAQ?

Yes

No - please attach to this application

## 3. Continuing Professional Development (CPD)

**The FCAQ CPD Tracker for 2022 must be completed and attached to this membership application.**

An Accredited Financial Counsellor (Non-Practising) must complete 20 points of CPD per year, including a minimum of one session from each of the categories – Technical, Skills and Ethics.

**Technical** – e.g., Content knowledge relevant to legal issues, banking, fines, EDR/IDR, superannuation, hardship, insurance, completion of Statements of Financial Position.

**Skills** – e.g., Counselling, mental health, communication (written, verbal), interviewing, cultural awareness, suicide prevention/training and negotiation.

**Ethics** – e.g., Conflict of interest, boundaries, counselling relationships, cultural awareness, options- client choices; appropriate referral to other services.

The FCAQ CPD Tracker for 2022 (which is located on the FCAQ website under **Members Toolkit**) assists with the CPD components and accumulation of points. It shows:

- (a) the date, duration, presenter, topic/event, and points allocated per activity; and
- (b) the total CPD points achieved.

Examples of acceptable CPD activities are set out in the FCAQ Membership Policy 2022 Version 1.

Have you met the requirement of at least one session from each of the categories – Technical, Skills and Ethics?

Yes

No ► you may not meet membership eligibility. Please contact FCAQ staff to discuss options.

Have you met the requirement of 20 points of CPD for the year?

Yes

No ► you may not meet membership eligibility. Please contact FCAQ staff to discuss options.

### CPD points

CPD Points should be recorded from 1<sup>st</sup> January until 31<sup>st</sup> December on the FCAQ CPD Tracker.

## MEMBER DECLARATION

I, \_\_\_\_\_ in making this application for membership of the Financial Counsellors' Association of Queensland, acknowledge and agree to the following:

1. The information that has been provided on this form, and on any attachments to it, is complete and correct in every detail.
2. Read the FCAQ Membership Policy 2022 Version 1 and the Australian Financial Counselling Code of Ethical Practice and agree to uphold them.
3. A member must advise FCAQ immediately of a change in circumstances relating to any information they have provided in or with this application.
4. No objection to any relevant person(s) being contacted to assist in determining my eligibility for membership and understand that FCAQ may, at times, need to discuss membership with the employer/agency management.
5. A membership certificate will not be processed until all parts of this form are completed and lodged with FCAQ and payment has been processed.
6. A non-practising member cannot practise financial counselling or provide professional supervision to financial counsellors throughout the membership year.
7. Meeting the Continuing Professional Development requirements and CPD policies of FCAQ.
8. Have met and agree to meet in the future the Constitution, By-Laws, Codes of Conduct and Policies & Procedures of FCAQ.
9. Will provide proof of adherence to the above when required.
10. Understand that the Association has agreed to the national standard Disciplinary Process - Policy and Procedures and that these govern how the Association assesses, handles, and responds to complaints about Members. Accordingly, members are bound by the Disciplinary Process - Policy and Procedures.
11. Where a complaint is made about a member, the member consents to the Association and any investigator appointed by the Association:
  - (a) Asking the employer, former employer, a client or former client, a co-worker or anyone else for relevant information and to the extent necessary to do so disclosing information to them about the complaint; and
  - (b) obtaining any personal information from current employer, a former employer, a client or former client, a co-worker or anyone else, in each case to the extent that the personal information appears to be relevant to the matters, subject of the complaint.
12. This Membership Application may be provided to anybody by way of evidence consented by the member to the Association, asking for and obtaining information for the purposes of handling a complaint.
13. If membership of the Association is suspended or terminated the Association may through Financial Counselling Australia make that information available to the financial counselling associations in other States and Territories of Australia.

Applicants Full Name: \_\_\_\_\_

Applicants Signature: \_\_\_\_\_

Date of Signature: \_\_\_\_\_

**FCAQ ELIGIBILITY MEMBERSHIP CHECKLIST (this forms part of the Member Declaration)**

**NAME:** \_\_\_\_\_

*Tick all applicable boxes in the relevant column to indicate your eligibility*

**Accredited Member (Non-Practising)**

**Circumstance**

Not practising as a financial counsellor.

Yes

Not employed in the finance industry.

Yes

**Completed Qualifications**

Diploma Financial Counselling CHC51115 or  
Diploma Community Services (Financial Counselling) CHC52108  
or accredited since 2001 or earlier.

Yes

**Experience**

Previously worked as an accredited FC.

Yes

Has over 2 years FC experience (FT or equivalent)  
Or 4 years part-time experience.

Yes

**CPD (submitting FCAQ CPD Tracker)**

Minimum PD requirement: 20 Points  
*\*PD must be structured and relevant to member.*

Yes

**This checklist is true and correct.**

**Signed:**

\_\_\_\_\_

**on Date:** / /

Yes <input type="checkbox"/>
Yes <input type="checkbox"/>
Yes <input type="checkbox"/>
Yes <input type="checkbox"/>
Yes <input type="checkbox"/>
Yes <input type="checkbox"/>

## NOTES