

2023 FCAQ APPLICATION FOR UPGRADE OF ASSOCIATE MEMBERSHIP TO ACCREDITED MEMBERSHIP

This application form should be read in conjunction with the FCAQ Membership Policy 2022 Version 1 available on the FCAQ website. Completed forms must be sent to membership@fcaq.org.au.

This form is to be used to upgrade from Associate to Accredited Membership after two years full-time or four years part-time experience as an Associate member (less than 20 hours per week is constituted as part-time). To meet the criteria for upgrading, you **MUST** bring your technical skills and required supervision hours up to date. If you are returning following a break from employment as a financial counsellor, do not complete this form. Please contact FCAQ at membership@fcaq.org.au.

To assist in the processing of this application for membership please note the following:

1. The completed membership application form, together with all supporting documentation, is to be emailed to membership@fcaq.org.au with the following in the subject title "<surname> membership". FCAQ will only accept forms that are sent by email to the above email address.
2. 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.
3. Supervision and required supervision hours:
 - (a) You will need to demonstrate that you have fulfilled the supervision requirements for an Associate Member from 1st January until the date of this application to upgrade.
 - (b) An Associate Financial Counsellor working full time (1.0 FTE) must have been supervised for at least 10 hours per calendar year. For Associate Financial Counsellors working less than 20 hours per week, a minimum of 6 hours per calendar year, or pro-rata based calculations will be applied on a minimum of 10 hours per calendar year.
 - (c) For all Associate Financial Counsellors, at least 50% of supervision hours per membership year should be individual 1:1 supervision with an FCAQ Approved Professional Supervisor. The remaining hours may be made up of group, casework, and clinical supervision.
 - (d) If an application to upgrade from Associate to Accredited membership is made during the year, rather than as of 1st January, compliance with Supervision hours to the date of upgrade will be calculated based upon the pro-rated requirements for Associate membership between 1st January and the date of upgrade.

Line Management supervision is a different process to professional supervision. Your Line Manager will not be recognised as your FCAQ Approved Professional Supervisor.

4. Continuing Professional Development (CPD)

- (a) If your application to upgrade from Associate Membership to Accredited Membership is made as of 31st December, you will need to demonstrate compliance with the CPD requirements for the past calendar year. If your application is at any other date within the calendar year, then your CPD points will be pro-rated from 1st January to the date of this application.
- (b) An Associate member 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.

5. Additional Supporting Documentation by way of the FCAQ Supervision Record Sheet 2022 and the FCAQ CPD Tracker for 2022 are to be submitted with this application.

Please also provide the following supporting documentation by way of attachment:

- Certificate confirming the completion of the Diploma of Financial Counselling CHC51115 or Diploma of Community Services (Financial Counselling) CHC52108.**
- A letter from your employer(s) to verify employment as a financial counsellor for a minimum of two years full time (or FTE) or 4 years part-time.**

6. Assessment Process: If you are approved for an upgrade of your membership, you will receive a notice in writing of membership acceptance. If you are not approved for membership, you will be advised in writing that:

- (a) Your membership application has been declined, together with the reason, or
- (b) your membership application has been declined because further information is required to support your application.

7. Fees

No additional fee is required for an upgrade from Associate to Accredited membership. Associate and Accredited membership fees are **\$155** per membership year or part thereof.

MEMBER DETAILS (please complete all required * information)

| | |
|---------------------------|--|
| Name: * | |
| Date of Birth: * | |
| Mailing address: * | |
| Email address: * | |
| Phone number: * | |

ORGANISATION/EMPLOYER

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

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

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

| |
|---|
| Are you employed by a non-profit organisation? <input type="checkbox"/> Yes <input type="checkbox"/> No - you do not meet membership eligibility |
| Are you employed in the finance industry, or does your employer hold a credit licence? <input type="checkbox"/> No <input type="checkbox"/> Yes - you do not meet membership eligibility |
| Do you or your organisation/employer charge a fee for service? <input type="checkbox"/> No <input type="checkbox"/> Yes - you do not meet membership eligibility |
| Does your organisation/employer receive direct funding from a credit provider to provide a financial counselling service? <input type="checkbox"/> No <input type="checkbox"/> Yes - you do not meet membership eligibility |

Which organisations or government departments fund your position?

Eligibility to upgrade from Associate Membership to Accredited Membership:

1. Working, or volunteering as a Financial Counsellor

| |
|---|
| Are you primarily working or volunteering as a Financial Counsellor, as per your position description? |
| <input type="checkbox"/> Yes <input type="checkbox"/> No - you may not meet membership eligibility – please discuss with FCAQ staff. |
| If yes: <input type="checkbox"/> Full Time <input type="checkbox"/> Part Time <input type="checkbox"/> Casual <input type="checkbox"/> Voluntary |

On average, how many hours do you work each week? _____

How many years Full Time Equivalent (FTE) working or volunteering as a financial counsellor? _____ FTE
(Accredited level requires 2 years FTE)

If you work less than 8 hours per week as a practising financial counsellor, we strongly recommend you contact FCAQ staff to discuss your membership options.

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

| |
|---|
| Have you completed the above Diploma? |
| <input type="checkbox"/> Yes <input type="checkbox"/> No ► you do not meet accredited membership eligibility. |
| Has a copy of your completed Diploma certification been provided to FCAQ? |
| <input type="checkbox"/> Yes <input type="checkbox"/> No ► please attach to this application. |

Date commenced: Date completed:

Name of Registered Training Organisation:
.....

3. Supervision Record

Your FCAQ Supervision Record Sheet must be completed and attached to this membership application.

If upgrading from Associate membership to Accredited membership during the membership year you should record supervision hours from 1st January until the date of upgrade. If your application to upgrade is made as of 31st December, it should record supervision hours from 1st January until 31st December.

Have you met the minimum requirement of 10 supervision hours?

Yes No

If no, have you met the required supervision hours considering your circumstances and application of pro-rata calculations (e.g., because you worked part time)? Please indicate below or attach a calculation of the number of supervision hours applicable to your circumstances.

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.....

4. Declaration by Supervisor(s)

I declare that the supervision hours provided by me as shown on the attached FCAQ Supervision Record Sheet 2022 are correctly stated:

Name of Professional Supervisor:

Signature:

.....

.....

Qualification of Professional Supervisor:

.....
Qualification of supervisor must be filled out in full (Please attach additional confirmations if required)

Name of Professional Supervisor:

Signature:

.....

.....

Qualification of Professional Supervisor:

.....
Qualification of supervisor must be filled out in full (Please attach additional confirmations if required)

5. Continuing Professional Development (CPD)

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

An accredited financial counsellor must complete 20 points of CPD per calendar 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 (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 2022 Policy 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 requirements 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

You should record CPD hours on the FCAQ CPD Tracker from the 1st January to date of this application. Otherwise, it should record CPD hours from 1st January until 31st December.

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. Meeting the Supervision requirements and Supervision policies of FCAQ. If there is a change in Professional Supervisor, the member must inform FCAQ by email within 30 days of that change.
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

Associate Member

Circumstance

Employed by non-profit organisation.

Yes

No fees charged for FC service.

Free

Completed Qualifications

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

Yes

Experience

Currently works as an FC

Yes

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

Yes

Minimum Annual FC Casework
8 hours per week
(Or equivalent to date of retrench/termination)

Yes

Supervision (submitting FCAQ Supervision Record Sheet 2022)

Supervisor is FCAQ Approved Professional Supervisor

Yes

Minimum supervision hours in 2022
(Or equivalent to date of retrench/termination)

Yes

CPD (submitting FCAQ CPD Tracker for 2022)

Minimum CPD requirement: 20 Points
*CPD must be structured and relevant to FC

Yes

This checklist is true and correct.

Signed: _____

on Date: / /

| |
|----------------------------------|
| Yes <input type="checkbox"/> |
| Free <input type="checkbox"/> |
| 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