

## 2023 FCAQ APPLICATION FOR RENEWAL OF ACCREDITED MEMBERSHIP

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 you are upgrading your membership from Associate to Accredited, please complete the form titled "2023 FCAQ Application to Upgrade from Associate to Accredited Membership" instead.**

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". FCAQ will only accept forms that are sent by email to the 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 and required supervision hours:

An Accredited Financial Counsellor working full time (1.0 FTE) must have been supervised for at least 10 hours during 2022 membership year. For part-time Accredited Financial Counsellors, pro-rata based calculations will be applied, subject to a minimum of 6 hours per calendar year.

This means:

- (a) 1.0 FTE: 10 hours
- (b) 0.8 FTE: 8 hours
- (c) 0.5 FTE and less: 6 hours.

\* Supervision must be at least 50% 1:1 supervision with an FCAQ Approved Professional Supervisor and the remaining 50% may be made up of group, casework, or clinical supervision.

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

5. Continuing Professional Development (CPD):

An accredited 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.

**6. The FCAQ Supervision Record Sheet 2022 and CPD Tracker for 2022 are to be submitted with this application.**

7. Assessment Process:

If your membership is approved with 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.

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

8. Fees:

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

**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 by a non-profit organisation?</b></p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No - you do not meet membership eligibility</p>
<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>
<p><b>Do you or your organisation/employer charge a fee for service?</b></p> <p><input type="checkbox"/> No <input type="checkbox"/> Yes - you do not meet membership eligibility</p>
<p><b>Does your organisation/employer receive direct funding from a credit provider to provide a financial counselling service?</b></p> <p><input type="checkbox"/> No <input type="checkbox"/> Yes - you do not meet membership eligibility</p>

Which organisations or government departments fund your position? \_\_\_\_\_

**Eligibility for 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?

Yes  No ► you may not meet membership eligibility

If yes:  Full Time  Part Time  Casual  Voluntary

If no: You are encouraged to contact FCAQ staff to discuss your membership options.

On average, how many hours do you work/volunteer 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 to discuss your membership options.***

If you have changed employers or number of hours during the year you will need to supply FCAQ with a letter from your employer outlining your duties as a financial counsellor and hours of work per week.

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

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

### 3. Supervision Record for 2022

#### ***Please attach your FCAQ Supervision Record Sheet for 2022***

If this is your first renewal since upgrading from Associate during the year, then the FCAQ Supervision Record Sheet 2022 should record supervision hours from the date of upgrade until 31st December. Otherwise, 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 upgraded your membership during the year or 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:**

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.....

**Qualification of Professional Supervisor:**

.....

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

**Name of External Professional Supervisor:**

**Signature:**

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.....

**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 for 2022 must be completed and attached to this membership application.

An accredited financial counsellor 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 requirements of 20 points CPD for the membership year?

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

### CPD points

If this is your first renewal since upgrading from Associate during the membership year, then you should record the CPD points from the date of the upgrade until 31<sup>st</sup> December. Otherwise, it should record CPD Points from 1<sup>st</sup> January until 31<sup>st</sup> 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. To 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 my Professional Supervisor, I will 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 complaint.
12. This Membership Application may be provided to anybody by way of evidence that I have consented to the Association, asking for and obtaining information for the purposes of handling a complaint about me.
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*

**Circumstance**

Employed by non-profit organisation.

No fees charged for FC service.

**Completed Qualifications**

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

**Experience**

Currently works as an FC

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

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

**Supervision (submitting FCAQ Supervision Record Sheet)**

Supervisor is FCAQ Approved Professional Supervisor

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

**CPD (submitting FCAQ CPD Tracker)**

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

**This checklist is true and correct.**

**Signed:**

\_\_\_\_\_

**on Date:** / /

**Accredited Member**

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