

*Application Form for CIPFA Members
Seeking Membership in CMA British Columbia through a MRA*



**Application Form for
Members of the Chartered Institute of Public Finance & Accountancy
(CIPFA)**

**Seeking Membership in CMA Canada – British Columbia
Through a Mutual Recognition Agreement**

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SECTION 1

INFORMATION AND INSTRUCTIONS

To be eligible for admission, applicants must:

- Possess a university degree; and
- Be legally entitled to either work in Canada, or be a citizen of Canada; and have a residential or business address in British Columbia; and
- possess a minimum of 2 years of relevant practical experience at the managerial level (Competency Level 2) gained while employed in Canada; and

***The CMA Competency Map appears at www.cma-canada.org**

- Be members in good standing with CIPFA with no outstanding disciplinary charges or outstanding complaints that are in the course of investigation; and
- Declare any criminal and any previous disciplinary action; and
- Must have started the CIPFA program before immigrating to Canada.

Applicants must complete or submit the following:

- Personal Information Form
- Employment History Form
- CMA Professional Membership application
- Application fee of \$285.71 + GST (\$300.00 incl. GST)
- Proof of Completion of University Degree
- Proof of CIPFA Membership in Good Standing

Applications will be treated with strict confidentiality. If an applicant is unsuccessful, the application, together with any attachments, will be destroyed or, upon request, returned to the applicant.

All attachments must be included with the application. Applications should be submitted to the attention of:

Peter Ferguson
Programs Coordinator
CMA Canada - British Columbia
Suite 1055, Two Bentall Centre
555 Burrard Street, Box 269
Vancouver, BC V7X 1M8

SECTION 2

PERSONAL INFORMATION FORM

Surname

First Name

Middle Initial

Date of Birth:

Month

Day

Year

Male

Female

Please indicate your preferred mailing address (check one as applicable):

HOME

BUSINESS

Company Name (if applicable)

Street Address

City

Province

Postal Code

Primary e-mail address

Home Telephone

Business Telephone

Facsimile

PREVIOUS SOCIETY MEMBERSHIP

Have you previously been a member, candidate, or associate/student of CMA Canada?

Yes No

If Yes, please provide information below:

Member (achieved full registered/certified member status)

Candidate (completed CMA Entrance Exam, but did not achieve designation)

Associate/Student (registered intent to complete entrance exam, but did not do so)

Province

ID Number

Date/Period

If you have held membership in this or another province or territory, please provide information on why this membership was discontinued:

CERTIFICATION , ATTESTATION & RELEASE

In making this application:

I confirm that I am a member in good standing with CIPFA with no outstanding disciplinary charges or outstanding complaints; that no previous disciplinary action has been taken against me and that I have no unreported criminal convictions; and,

I confirm that I have not, at any time in the past, failed a CMA Canada qualifying examination (Final Accreditation Examination or Entrance Examination) or another CMA Canada accreditation program; and,

I have read, had opportunity to request clarification upon, and agree to abide by the governing legislation, By-Laws, Rules of Professional Conduct and Policies of CMA BC; and

I understand and will comply with the stipulation that I may not perform public accounting in British Columbia solely by virtue of this agreement; and

I certify that the information provided in this application package is accurate and complete, and that I understand that submitting false or deliberately misleading information will be grounds for immediate disqualification of my application or cancellation of membership if subsequently discovered; and,

By signing below, I authorize CMA BC to contact, at their sole discretion and without notice to me, any individuals, businesses, or organizations listed in this application including CIPFA to verify the information I have provided; and,

I authorize CMA BC to retain a copy of this application document and all attachments, in full, as part of my permanent member file should I be successful in my application, and I consent to the use, retention, and periodic updating of this information for the purposes of CMA BC and CMA Canada maintaining and updating my membership record.

Signature

Date

Printed Name

SECTION 3

EDUCATION SUMMARY

■ Submitting Academic Transcripts

As part of your application we require official transcripts to be sent to us directly from the institution where you completed your Canadian degree(s).

For international transcripts you have one of the following 2 options:

OPTION 1: CMA BC TRANSCRIPT EVALUATION

I have completed post secondary education outside of Canada, and would like my international transcripts evaluated for the purposes of the CIPFA/CMA Mutual Recognition Agreement.

This option is not available to graduates of all institutions in all countries, and is subject to the following limitations:

- An official transcript must be issued in English (Official transcripts are those that are issued in an envelope bearing the institution's seal and/or are signed across the envelope flap), and must be sent directly to CMA BC from the post-secondary institution.
- The transcript must be issued from an internationally recognized university where no additional verification of the credential is required.
- An official transcript must include course titles, dates courses were completed, marks obtained for each, and verification of and dates when the degree (degrees) was obtained.

CMABC reserves the right to refer an application to ICES in cases where transcripts are deemed insufficient or where CMA BC is unable to verify the credential due to authenticity concerns or insufficient documentation. Official Transcripts must be sent directly from/by the Post Secondary Institution to CMA BC at the address listed below.

OPTION 2: INTERNATIONAL CREDENTIAL EVALUATION SERVICES (ICES) EVALUATION

I have completed post secondary education outside of Canada and my transcripts do not qualify for the CMA BC Transcript Evaluation (Option 1)

If your transcript is not issued in English you will need the International Credential Evaluation Service (ICES) to evaluate your transcripts. ICES will determine your equivalency status for any of CMA's programs leading to the CMA designation.

For the purposes of the CIPFA/CMA Mutual Recognition Agreement, we require a **BASIC REPORT from ICES.**

ICES application packages are available at CMA Canada – British Columbia or online at www.bcit.ca/ices. Applicants are responsible for ICES evaluation fees, and costs of obtaining certified translations if applicable.

PLEASE NOTE: Your application will not receive final approval by the Admissions Panel until official transcripts or official ICES reports are received. For this reason we recommend that you request transcripts be sent to us as early as possible.

■ **University Degrees / Other Academic Qualifications**

Please list all university degrees for which you have requested transcripts or an ICES basic report:

| Name of Institution | Degree Type | Year Granted |
|---------------------|-------------|--------------|
| | | |
| | | |
| | | |

■ **Other Professional Certifications**

Please list any other professional certifications that you hold.

| Name of Professional Body | Certification | Year Granted |
|---------------------------|---------------|--------------|
| | | |
| | | |
| | | |

SECTION 4

PRACTICAL EXPERIENCE REQUIREMENT

The Practical Experience requirement consists of 4 levels of experience, determined by the type of decision making required to perform the function:

- i. CS_1 Acquisition
- ii. CS_2 Basic Proficiency
- iii. CS_3 Advanced Proficiency
- iv. CS_4 Mastery

All applicants must have 2 years of relevant practical experience at the CMA Competency level 2 which must be gained while employed in Canada.

***The CMA Competency Map appears at www.cma-canada.org**

Please note that current and/or past employers will be contacted selectively to verify the accuracy of the information provided.

The CMA as strategic leader

A CMA is defined by his or her capabilities as an integrative strategic leader within the enterprise, a role which goes beyond the traditional boundaries of management accounting to include a growing array of cross-functional business and professional skills, such as:

| | |
|-----------------------------------|-----------------------------------|
| Analytical Problem Solving Skills | Managing Projects |
| People Management Skills | Strategy Implementation |
| Judgment/Synthesis Skills | Strategic Performance Measurement |
| Organizational Skills | Managing Business Risk |
| Financial Management | Strategy Formulation |

In applying for the CMA/CIPFA Mutual Recognition Agreement, you are required to demonstrate through your career to date that you have mastered many of these disciplines and already have a considerable body of business and professional skills to bring to the designation. In assessing your practical experience, we require behaviorally-based examples of your professional achievements to date. This means that you should be able to identify specific instances in your career which highlight your current proficiency in each of the required experience areas and that speak to your ability to continue demonstrating these attributes in future.

DEMONSTRATION OF WORK EXPERIENCE REQUIREMENTS

Drawing on your previous work experience and professional accomplishments, demonstrate how you have a minimum of two years of related work experience. Please use examples of specific instances in your career that demonstrate the strategic financial work experience requirements. Use a separate sheet for each of the four statements.

a) Duties Performed

I participate in short and long-range planning. I make independent decisions on work methods and procedures within an overall program. Originality and ingenuity are required for devising practical and economical solutions to problems.

b) Advice and Recommendations Provided

I make responsible decisions on all matters, including the establishment of policies and the implementation of major programs, subject only to overall policy and financial controls.

c) Leadership and Supervisory Responsibilities Exercised

I outline more difficult problems and methods of approach. I review and evaluate work, coordinate activities to attain program objectives and make recommendations as to the selection, training, discipline and remuneration of staff.

d) Strategic Financial Management

I participate in strategic financial management in several of the following areas: performance management, performance measurement, financial reporting, governance and risk management, financial resource management, strategic management.

SECTION 5

EMPLOYMENT HISTORY

For each significant position mentioned in your resume please provide the following information:

Current/Most Recent Position

Name of Organization

No. of Employees*

*where applicable, specify the number of employees nationally, as well as within your province or territory

Organization Profile

(provide a brief description of the organization's core business focus and activities)

Your Position Title

Period of Employment

Name of person to who you report

Their title

Contact Telephone No.

Facsimile No.

E-mail contact

Note: We reserve the right to contact this person without notice to you at the time of your application going forward to the Admissions Panel.

Organization Chart

For illustrative purposes, please provide a visual organization chart that clearly shows your management relationship to the major units or departments of the organization.

Prior Position 1

Name of Organization

No. of Employees

Organization Profile

(provide a brief description of the organization's core business focus and activities)

Your Position Title

Period of Employment

Name of person to who you report

Their title

Contact Telephone No.

Facsimile No.

E-mail contact

Note: We reserve the right to contact this person without notice to you at the time of your application going forward to the Admissions Panel.

Organization Chart

For illustrative purposes, please provide a visual organization chart that clearly shows your management relationship to the major units or departments of the organization.

Prior Position 2

Name of Organization

No. of Employees

Organization Profile

(provide a brief description of the organization's core business focus and activities)

Your Position Title

Period of Employment

Name of person to who you report

Their title

Contact Telephone No.

Facsimile No.

E-mail contact

Note: We reserve the right to contact this person without notice to you at the time of your application going forward to the Admissions Panel.

Organization Chart

For illustrative purposes, please provide a visual organization chart that clearly shows your management relationship to the major units or departments of the organization.

Prior Position 3

Name of Organization

No. of Employees

Organization Profile

(provide a brief description of the organization's core business focus and activities)

Your Position Title

Period of Employment

Name of person to who you report

Their title

Contact Telephone No.

Facsimile No.

E-mail contact

Organization Chart

For illustrative purposes, please provide a visual organization chart that clearly shows your management relationship to the major units or departments of the organization.

SECTION 6

GOVERNING LEGISLATION & CODE OF PROFESSIONAL CONDUCT

The Certified Management Accountants of BC (CMA BC) and its members are bound by provincial legislations known as the Accountants Management Regulation there under.

In addition CMA BC establishes B-Laws & a Professional Code of Conduct to which candidates and members must adhere to.

In summary:

- The Act provides CMA BC with the sole authority to accredit CMA's in the province of British Columbia, including the right to self government, self-regulation and the right for CMA BC members to audit and review engagements provided that they meet the accreditation requirements specified in the Act. The Act also prescribes the overall admission requirements and standards of the profession.
- The By-laws outline the structure and function of CMA BC, including the rights and responsibilities of members and candidates.
- The Professional Code of Conduct outlines the parameters of professional conduct for members and candidates.

These documents provide CMA BC with the sole authority as a self-regulating body under legislation to accredit CMAs in the Province of British Columbia.

Applicants under this MRA have a specific duty and obligation to inform themselves about each of these documents prior to making an application for membership with CMA BC as an affiliate of the national CMA Canada organization. If accepted as members, applicants will be fully bound by these documents while retaining membership with CMA BC (or by the separate requirements governing other provinces or territories to which the member may subsequently transfer), and the member will be required to maintain their understanding of these documents through regular review. Where required by CMA BC, this may necessitate periodic renewals of adherence to specific provisions, such as annual declarations or reporting on ethics and conduct, or post-designation learning compliance.

All documents cited above are publicly available on the CMA BC website as follows:

1. Go to www.CMA BC.com
2. Click on "Becoming a CMA"
3. Click on the sub-section titled "Internationally Trained Professionals"

IMPORTANT!

By signing and submitting this application form, you are attesting that you have reviewed and understood the documents cited above. If you have any questions on these documents, please contact CMA BC for assistance and guidance **before** making your application.

SECTION 7

PROFESSIONAL MEMBERSHIP APPLICATION

Name _____ Member Number _____

Address _____ City _____ Postal Code _____

Res. Phone () _____ Bus. Phone () _____ Birth Date _____

I hereby apply for admission as a Certified Management Accountant with the CMA Canada – British Columbia. I enclose any outstanding membership dues payable to the Certified Management Accountants Society of British Columbia.

I undertake, if admitted, to observe the provisions of the by-laws, rules and regulations of the Society.

Signature _____ Date _____

CMA Sponsorship

Signatures from two CMAs who support the above application for certified status. Sponsors are vouching for the character and the integrity of the applicant.

1. Name (please print) _____ Member Number _____

Signature _____ Province _____

2. Name (please print) _____ Member Number _____

Signature _____ Province _____

For Office Use Only

| Academic Record | | | Fees | Amount |
|------------------------------------|------------------------------|-----------------------------|---------------------------|---------------|
| Transcript reviewed and confirmed: | Yes <input type="checkbox"/> | No <input type="checkbox"/> | CMA Membership fees paid: | \$ _____ |
| CIPFA Application complete: | Yes <input type="checkbox"/> | No <input type="checkbox"/> | | |
| Total academics complete: | Yes <input type="checkbox"/> | No <input type="checkbox"/> | | |

Approval

Application ready for the review of the Accreditation Review Committee (ARC): Yes No

Secretary _____ Chair, ARC _____

CMA Certificate Number _____ CMA Date _____

SECTION 8

PAYMENT INFORMATION

| | |
|---|--|
| Mutual Recognition Agreement application fee | \$285.71 + GST (\$300.00 including GST) |
| Method of Payment: | |
| <input type="checkbox"/> Cheque (payable to CMA BC) | |
| <input type="checkbox"/> Cash (in person only) | |
| <input type="checkbox"/> Debit Card (in person only) | |
| Credit Card: | |
| <input type="checkbox"/> Visa <input type="checkbox"/> MasterCard <input type="checkbox"/> American Express | |
| Card No: _____ | Expiry Date: _____ |
| Name of cardholder: _____ | |
| Signature of cardholder: _____ | |

