

Application for admission by affiliation¹

Collection, use and disclosure of personal information

By completing your application for admission by affiliation and any other related form, you consent to the collection and use by the Order of the personal information disclosed for the protection of the public. This mandatory process allows you to update your profile, validate your member status and make any other declaration the Order required to supervise the practice of the profession and otherwise protect the public. Your personal information will be made available to Order staff members who need it to carry out their duties. This mandatory process allows us to :

- ▶ Analyze your application for admission;
- ▶ Ask you to make any other declarations required by the Order to monitor the practice of the profession;
- ▶ Issue you with a CPA permit and, where applicable, a public accountancy permit;
- ▶ Register you on the roll of members and otherwise protect the public.

I have read and understood.

The personal information collected in this application may be communicated to the CPA professional organization in another Canadian province or territory or in Bermuda (hereinafter referred to as the "Third-Party Organization") to which you belong, if applicable, for the purposes of verifying and processing your application.

Additional personal information may be collected by the Order from the Third-Party Organization, where applicable, for the same purposes.

Completing this request and consenting to these requests for authorization to communicate and collect is a prerequisite for us to process your request.

I authorize the Order to transmit my personal information to the Third Party Organization for the purposes described above.

I authorize the Order to collect my personal information from the Third-Party Organization for the purposes described above.

If you have any other questions, requests or comments related to the Order's management of your personal information, go to the [Protection of personal information section of our website](#).

Part 1 General information

Section A – Contact information

First name	Last name		
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>		
Home address			
<input style="width: 95%;" type="text"/>			
Apt.			
<input style="width: 95%;" type="text"/>			
City	Province	Postal code	Country
<input style="width: 45%;" type="text"/>	<input style="width: 10%;" type="text"/>	<input style="width: 15%;" type="text"/>	<input style="width: 30%;" type="text"/>
Telephone (home)	Telephone (cell)	Email address (home)	
<input style="width: 15%;" type="text"/> <input style="width: 15%;" type="text"/> - <input style="width: 15%;" type="text"/>	<input style="width: 15%;" type="text"/> <input style="width: 15%;" type="text"/> - <input style="width: 15%;" type="text"/>	<input style="width: 95%;" type="text"/>	
Date of birth	Sex		
<input style="width: 10%;" type="text"/> <input style="width: 10%;" type="text"/> <input style="width: 10%;" type="text"/>	<input type="checkbox"/> F <input type="checkbox"/> M		

 **Attach the documents listed below depending on your situation.**

You were born in Canada:

- ▶ your birth certificate issued by the competent authority in Canada; **AND**
- ▶ one piece of identification issued by a competent authority in Canada (e.g. health insurance card, driver's licence, passport).

¹ Admission pursuant to the *Règlement sur les autorisations légales d'exercer la profession hors du Québec qui donnent ouverture au permis de l'Ordre des comptables professionnels agréés du Québec* (in French only).

Part 1 Identification (cont.)

You were born outside of Canada:

- ▶ your birth certificate issued by the competent authority in your country of birth; **AND**
 - ▶ two pieces of identification issued by a competent authority in Canada or by the competent authority in your country of birth (e.g. health insurance card, driver's licence, passport).
- △ Documents in a language other than French or English must be translated by a certified translator.

Section B – Professional contact details

Present employer	Title of position	Since	
<input type="text"/>	<input type="text"/>	<input type="text"/> YYYY <input type="text"/> MM <input type="text"/> DD	
Professional address	Suite		
<input type="text"/>	<input type="text"/>		
City	Province	Postal code	Country
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Telephone (work)	Ext.	Fax (work)	Email address (work)
<input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/>	<input type="text"/>

Section C - Correspondence and subscription preferences

In accordance with the *Charter of the French Language*, the Order will communicate with you exclusively in French. If a temporary permit or a restricted permit is issued to you, the Order may communicate with you in English in some circumstances.

Mailing address Personal Professional
Email Personal Professional

Subscription to optional e-communications from the Order

Electronic communications related to the accounting profession, the Order's mission (i.e. the protection of the public), and the legislative and regulatory aspects of the profession are sent via the *CPA Newsletter* or personalized emails from which you cannot subscribe.

In addition to these communications, you may receive **optional communications**, such as the *CPA plus* newsletter and various targeted emails, which keep you updated on the profession so that you do not miss any of the opportunities available to you. **You can choose the optional communications you wish to receive below and may change your selections at any time.**

I want to receive the *CPA plus* newsletter, a monthly newsletter that provides a variety of topical information about the profession (news, events, job offers, training opportunities, etc.). Yes No

I want to receive personalized emails on the following topics of interest:

- Topics of general interest (news, events) Yes No
- Professional development (e.g. training and promotional offers) Yes No
- News and activities in my region – Choose up to two regional groups
 - None 1st choice 2nd choice
 - Abitibi-Témiscamingue 1st choice 2nd choice
 - Chaudière-Appalaches 1st choice 2nd choice
 - Eastern Quebec 1st choice 2nd choice
 - Estrie 1st choice 2nd choice
 - Laval – Laurentians – Lanaudière 1st choice 2nd choice
 - Mauricie – Central Quebec 1st choice 2nd choice
 - Montérégie 1st choice 2nd choice
 - Montreal 1st choice 2nd choice
 - Outaouais 1st choice 2nd choice
 - Quebec City 1st choice 2nd choice
 - Saguenay-Lac-Saint-Jean 1st choice 2nd choice
- Promotional offers from partners Yes No

Part 1 Identification (cont.)

Sharing your personal information with the CPA Foundation

The Foundation of Quebec CPAs (Foundation) is essentially funded by donations from members and candidates who are entered on the Order's roll. To ensure its survival and continue providing essential assistance to future CPAs, the Order hopes that you will authorize it to share some of your personal information with the Foundation so that it can contact you. You can change your consent at any time.

We are really counting on you to show your solidarity and commitment to the Foundation and future CPAs by giving your consent!


I authorize the Order to share my personal information with the Foundation. Yes No

Section D - Lists of new CPAs or newly admitted CPAs in Quebec


I authorize the use of my full name on lists of new CPAs that the Order or its regional groups may publish on their print or digital platforms, including CPA newsletters, the Order's website and on social media, or on the print or digital platforms of third parties, and I waive all rights to compensation. Yes No

Part 2 Declaration

2.1 I have been a member in good standing of (professional CPA organization in another Canadian province or territory, or in Bermuda)

 Please complete part 1 of the Request for information regarding the admission of a CPA from another Canadian province or territory or Bermuda and **ask your professional CPA organization to complete part 2 of the form and email it to tableaucpa@cpaquebec.ca**.

I am also authorized to practice public accountancy in that Canadian province or territory or in Bermuda. Yes No

 **If yes**, please attach a copy of your permit or licence.

2.2 I hereby request that a CPA permit be issued to me for the following reasons:

I agree to comply with the *Chartered Professional Accountants Act*, the *Professional Code*, the *Code of Ethics of CPAs*, the *Charter of the French language* and all regulations of the Order. Your initials

I acknowledge that, under the *CPA Act*, I will not be allowed to use the dual designation which refers to my legacy order, if applicable, even though the rule in effect in the province where I practice may differ. Your initials

I hereby declare that I have not offered public accountancy services in Quebec, including the performance of audit, review and compilation engagements, and I have not presented myself as a chartered professional accountant in Quebec, and that I have not used in Quebec the CPA designation or any other designation or abbreviation which may lead to the belief that I was a member in good standing of the *Ordre des comptables professionnels agréés du Québec*. Your initials

I agree not to offer or deliver such services in Quebec and not to use the chartered professional accountant designation in Quebec until the date of my official instatement on the roll of the *Ordre des comptables professionnels agréés du Québec*. Your initials

Partie 3 Permis

I hereby request that the following type of permit be issued to me:

A regular permit

A temporary permit

A restricted permit

Permit type	Regular permit	Temporary permit	Restricted permit
	Valid for one year and renewable up to 3 times Allows you to keep learning French and pass the examination of the Office québécois de la langue française.	Valid for as long as you meet the conditions for obtaining this permit.	
Conditions for obtaining the permit	My knowledge of the French language meets the requirements of section 35 of the <i>Charter of the French Language</i> .	My knowledge of the French language does not meet the requirements of section 35 of the Charter of the French Language. AND I have acquired the requisite professional competencies for the CPA permit outside Quebec.	My knowledge of the French language does not meet the requirements of section 35 of the Charter of the French Language. AND I practice my profession on behalf of a single employer in a position where I do not deal with the public.
Documents that must be attached	Attach any of the following documents: <ul style="list-style-type: none"> Official transcript indicating that you have received no less than three years of full-time instruction delivered in French, regardless of the country Secondary school transcript issued by Quebec's Ministère de l'Éducation, indicating that you passed the fourth or fifth year secondary level examination for French as a first language Secondary school diploma issued by Quebec's Ministère de l'Éducation as of or after the 1985-1986 school year Certificate attesting that you passed the examination of the <i>Office québécois de la langue française</i> 	Copy of your undergraduate degree obtained outside Quebec in the field of accounting, or proof of equivalence, if you have obtained equivalence.	The Order will contact you about the documents you need to attach.

Part 4 Declaration under section 45.2 of the *Professional Code*

4.1 I (or an entity of which I am the sole director or principal shareholder) have declared bankruptcy in Canada or in another country and I have not yet informed the Order in writing.¹ Yes No

4.2 I have been found guilty of violating a tax act, a securities act, or an anti-money laundering or anti-terrorist financing act in Canada and in another country or a regulation made thereunder and I have not yet informed the Order in writing.² Yes No

Here are some examples of situations where you must answer "Yes":

- I have received a statement of offence for failing to file a tax return in the manner and within the periods prescribed and I had to pay a penalty to the tax authorities.
- In the context of a lawsuit brought by tax authorities, the Court of Quebec has sentenced me to pay a fine under the *Tax Administration Act*, the *Excise Tax Act* or the *Tobacco Tax Act*.
- In the context of a lawsuit brought by the Autorité des marchés financiers, the Court of Quebec has sentenced me to pay a fine under the *Securities Act*.
- In the context of a lawsuit brought by the Public Prosecution Service of Canada, the Court of Quebec has sentenced me to pay a fine under the *Proceeds of Crime (Money Laundering) and Terrorist Financing Act*.

4.3 I have been the subject of a final decision by an administrative body that concluded that I violated a tax act, a securities act or an anti-money laundering or anti-terrorist financing act in Canada and in another country or a regulation made thereunder.³ Yes No

Here are some examples of situations where you must answer "Yes":

- The Financial Markets Administrative Tribunal has prohibited me from practicing certain activities or holding specific functions in connection with securities or restricted my right to do so or has imposed an administrative penalty on me for violations of the *Securities Act*.
- The Autorité des marchés financiers has imposed an administrative monetary penalty on me for violating the *Securities Act*.
- The Financial Transactions and Reports Analysis Centre of Canada (FINTRAC) has imposed an administrative monetary penalty on me for failing to comply with the *Proceeds of Crime (Money Laundering) and Terrorist Financing Act*.
- The Capital Markets Tribunal of Ontario has imposed an administrative penalty on me for violating the *Securities Act of Ontario*.

¹ Under section 16 of the *Code of Ethics of Chartered Professional Accountants*, you must inform the syndic of the Order in writing within 10 days of the occurrence of bankruptcy.

² Under section 59.3 of the *Professional Code*, you must notify the secretary of the Order that you are the subject of such a decision within 10 days of the date on which you yourself were served the decision. Under section 15 of the *Code of Ethics of Chartered Professional Accountants*, you must also notify the syndic of the Order within 10 days of the decision.

³ Under section 15 of the *Code of Ethics of Chartered Professional Accountants*, you must notify the syndic of the Order within 10 days of the decision.

Part 4 Declaration under section 45.2 of the *Professional Code* (cont.)

4.4 I have been found guilty of a criminal offence in Canada or another country and I have not yet informed the Order in writing.⁴ Yes No

Here are some examples of situations where you must answer “Yes”:

- I have obtained an absolute or conditional discharge.
- I have obtained a criminal record suspension (an administrative “pardon”).
- I am awaiting my penalty or sentence.
- I am in the process of appealing.
- The offence for which I was found guilty is not in connection with the practice of the CPA profession.

4.5 I have been the subject of a disciplinary decision by another professional order or a similar organization in Quebec or elsewhere and I have not yet informed the Order in writing.⁴ Yes No

4.6 I have been found guilty of illegally practicing a profession or making unauthorized use of a professional designation* in Quebec or elsewhere and I have not yet informed the Order in writing.⁴ Yes No

*Including the illegal practice of an activity reserved for CPAs or the illegal use of a designation related to the accounting profession.

4.7 I am being prosecuted for an offence punishable by a term of imprisonment of five or more years in Canada or another country and I have not yet informed the Order in writing.⁴ Yes No

Part 5 Signature

I hereby declare that the information provided in this application and, where applicable, in the accompanying documents, is true, and I understand that any false or incomplete statement could have significant implications.

Signature

_____| ____| ____|
Date

Part 6 Fees and payment terms

A fee of \$440 is required to open your application. An invoice will be sent to you by the Order. In order for your application to be processed, the fees must be paid in full, by credit card.

Your dues notice, which include your professional liability insurance premium, if applicable, will be placed in your file in the days following your admission. The Order will inform you by email. Your dues must be paid within 30 days following the date on which you are admitted to the Order.

 **Please return this duly completed and signed form along with the required documents by email at tableauCPA@cpaquebec.ca.**

⁴ Under section 59.3 of the *Professional Code*, you must notify the secretary of the Order that you are the subject of such a decision within 10 days of the date on which you yourself were served the decision.