

# 2018 - 2019 Annual Membership Dues (AMD) and Contact Information Update Retired or Equivalent Update Form 4-2C

CPA Ontario ID:

Complete this form to remit your retired waiver of the Annual Membership Dues (AMD) to Chartered Professional Accountants of Ontario (CPA Ontario) and Chartered Professional Accountants of Canada (CPA Canada). The AMD retired waiver covers the fiscal period April 1, 2018 to March 31, 2019 and is due no later than June 1, 2018. Members, who fail to submit a retired waiver request, provide all information and documents requested by the Registrar or, where such document is not available, fail to provide alternate proof satisfactory to the Registrar by June 30, 2018 are subject to membership suspension.

**A. Member's Full Name and Home Mailing Address**

**B. Alternate Address Information**

Preferred Mailing Address (please select **ONE**):

Home

Alternate

**C. Contact Information\***

Home Tel:

Business Tel:

Mobile Tel:

Business Fax:

Preferred Email:

Alternate Email (if avail.):

Job Position/Title:

**\* CPA Ontario Communications**

Members must be sent all legal notices. Legal notices include AMD notices and meeting notices such as the Annual General Meeting and any Special Meetings.

**D. Annual Membership Dues (AMD) Remittance**

Dues Code Billed: \$

Change Dues Code to\*\*:

\*\* For explanation on retirement waiver options, please refer to the Information Guide for Retired or Equivalent Membership Dues Waiver on page 2.

To change your membership dues code, please indicate:

- Retirement Date, if applicable (mm/dd/yyyy):        /        /
- If not Ontario, the provincial accounting body through which you obtained your retired-member status:

**E. Declaration**

I certify that all information provided in this submission is true, accurate and complete. I acknowledge that CPA Ontario may require additional documentation or evidence within 30 days of a request for same by CPA Ontario. I agree to maintain such supporting documentation or evidence for a period of 12 months after the date of this submission. Further, I agree to notify CPA Ontario within 30 days should any of the information provided in this submission become untrue, inaccurate or incomplete.

Print Full Name

X \_\_\_\_\_  
Signature

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Date (mm/dd/yyyy)

### Annual Membership Dues Billing Code Changes

Membership dues are based upon data on file at the time of billing. Should your membership dues billing code need to be changed, please ensure that you have made all the required changes to your membership data on the form. All requests for changes to the membership dues billing code will be reviewed and must be supported by updated membership data.

### Deferral, Waiver or Dues Reductions

To request a deferral, waiver or reduction of the AMD, please complete the [2018-2019 Annual Membership Dues \(AMD\), Financial Waiver, Deferral or Reduction Request Form 4-2B](#).

### Resignations

To resign from membership, please complete the [Membership Resignation Form 4-3A](#). Resignation forms received between April 1, 2018, and June 30, 2018, are subject to 50 per cent of the full 2018-2019 Annual Membership Dues. Resignation forms received after June 30, 2018, are subject to the full applicable membership dues.

### Transfer to Another Provincial Accounting Body

Many members choose to retain memberships with more than one provincial accounting body. There is a reduced fee for the non-primary membership that may be obtained by amending your billing code in the dues remittance change section. If you choose not to retain membership with CPA Ontario, you will need to complete the [Membership Resignation Form 4-3A](#).

### Public Accounting Licence (PAL)

Members, who hold a Public Accounting Licence (PAL) or may be applying for a PAL, must complete the annual minimum CPD requirements. The CPD must be completed in activities directly related to the competencies needed to provide public accounting services. Exemptions from the 2017 CPD requirements or failure to comply with the annual minimum or triennial CPD requirements may impact your ability to renew or apply for a PAL.

### Practice Registration

Members who are providing public accounting services or accounting services to the public are reminded of the requirement to register a practice. Information on how to set up a public accounting practice is available at [cpaontario.ca/PublicPractice](http://cpaontario.ca/PublicPractice).

### Questions

If you have any questions, please contact our Customer Service Centre at [amd@cpaontario.ca](mailto:amd@cpaontario.ca) or call 1 800 387.0735 during our Customer Service Centre's regular business hours: Monday to Friday, 8 a.m. to 6 p.m. Our team is here to support you throughout the AMD and CPD process.

### Forms

All forms are available for printing at [cpaontario.ca/members-forms](http://cpaontario.ca/members-forms).

### Privacy Statement

CPA Ontario is committed to respecting your privacy and protecting your personal information. The collection, use and disclosure of your personal information that may be made by CPA Ontario are described in [CPA Ontario's Privacy Policy](#). The information collected in CPA Ontario's member portals is used primarily for the purposes of annual membership renewal.

### Information Guide for Retired or Equivalent Membership Dues Waiver

**Dues Codes:** Enter any changes to the Dues Code in Section D of this form.

**Note:** The retirement waiver is not automatic and due to the income criteria, must be applied for every year.

Code	Qualifications	Total Dues (If criteria met prior to April 1, 2018)
9B	Members who have reached the age of 55 or more and whose gross annual income, excluding pension or other retirement and investment income, is not greater than \$25,000; AND their age plus the total number of years of continuous membership in good standing in CPA Ontario and respective Ontario legacy bodies, and/or one or more provincial bodies or an accounting body recognized by the Council, equals or exceeds the sum of 70.	No Dues
9C	Members who have retired-member status in another provincial body or accounting body listed in the Schedules to Regulation 6-2 and have completed 15 years of continuous membership in good standing in CPA Ontario or who have retired-member status with an Ontario legacy body.	No Dues
9D	Members who have reached the age of 65 or more and who have been granted retired-member status in another provincial body or an accounting body listed in the Schedules to Regulation 6-2 and have completed at least one year of membership in good standing in CPA Ontario or an Ontario legacy body.	No Dues
1000	Members who have been elected to Life Membership in CPA Ontario.	No Dues