

# Continuing Professional Development

It is the responsibility of ATAINZ Members to select professional development courses and activities that contribute towards their Continuing Professional Development (CPD) Hours.

These courses and activities are not restricted to those organised by ATAINZ nor are they restricted to accounting or taxation topics. Courses or activities should assist Members in their continuing professional development.

Continuing Professional Development is a combination of both Structured and Unstructured activities:

## **Structured Activities:**

Structured activities includes both Informal and Formal activities:

- (a) Informal activities includes such things as:
  - Reading of technical or professional articles.
  - Viewing of the ATAINZ Ethics video.
  - Viewing of technical or professional articles on the internet.
  - Participating in mentoring or group discussions.
- (b) Formal activities include such things as attending organised or structured training or courses.

## **Unstructured Activities:**

Unstructured is an activity that assists the Member grow as an individual, but does not involve structured study that relates to the Accountancy industry.

## **Continuing Professional Development Hours Requirements:**

To meet ATAINZ Continuing Professional Development requirements, ATAINZ Members must obtain the following minimum Continued Professional Development (CPD) Hours over a 12 month period being from 1<sup>st</sup> January to 31<sup>st</sup> December.

### **(a) Professional Tax & Business Advisor (PTBA)**

PTBA Members must obtain a minimum of **40** CPD Hours from the following activities:

- 10 Hours Informal (maximum)
- 30 Formal (minimum)
- 5 Unstructured (maximum)

### **(b) Registered Tax and Business Advisor (RTBA)**

RTBA Members must obtain a minimum of **30** CPD Hours from the following activities:

- 10 Hours Informal (maximum)
- 25 Formal (minimum)
- 5 Unstructured (maximum)

# Continuing Professional Development

## (c) Associate Tax & Business Advisor (ATBA)

ATBA Members must obtain a minimum of **25** CPD Hours from the following activities:

- 10 Hours Informal (maximum)
- 20 Formal (minimum)
- 5 Unstructured (maximum)

## Retired & Academic Membership:

There are no Continuing Professional Development requirements for Retired or Academic Members or those ATAINZ Members who are on approved Sabbatical Leave.

## Conference/Workshop LiveStream:

To qualify for LiveStream CPD Hours you must register for the Conference/Workshop. Should you choose to watch the LiveStream with other Members then only those who have registered will receive CPD Hours.

<b>Structured Activities</b>	
<b>Informal Activities</b>	<b>CPD Hours</b>
Informal Study – member initiated activity	10 Hours maximum
<b>Formal Activities</b>	<b>CPD Hours</b>
Participation as an ATAINZ Board Member	20 Hours
Participation as an ATAINZ Regional Coordinator	10 Hours
Attendance at ATAINZ Conference:	
- Day 1	8 Hours
- Day 2	8 Hours
LiveStream of ATAINZ Conference:	
- Day 1	6 Hours
- Day 2	6 Hours
Attendance at ATAINZ Workshop	8 Hours
LiveStream of ATAINZ Workshop	6 Hours
Attendance at an ATAINZ Regional Meeting	Based on Hours of attendance
ATAINZ Practice Review	4 Hours
Completing a Tertiary Level paper:	
- Tax Course	20 Hours
- Business Course	10 Hours
Attendance at Franchise organised training, seminars or courses, such as SBA, Tax Link, First Class Accounts, etc	Based on Hours of attendance
Completing a Full Day Tax or Business related course provided by professional advisor's or Tertiary providers.	Based on Hours of attendance
Viewing any industry related webinar	Based on Hours of Webinar
Attendance at organised Roadshows by Xero, MYOB, etc	Based on Hours of attendance

# Continuing Professional Development

Completing other courses held by organisations such as ACC, Xero, MYOB, CCH, IR, CAANZ, NZBAI, The Career Academy, etc	Based on length of Course
Attendance at other Professional Bodies annual conference. Such as CAANZ, NZBAI, NZIM, Xerocon	Based on Hours of attendance
Researching and writing technical articles that are published in a journal or on the internet.	5 Hours per publication
Participation as a member of a technical or research committee for a professional body or Government Agency	5 Hours per Committee/Agency
Participation in the ATAINZ Mentoring Program	Based on hours of involvement to a maximum of 10 hours
Partaking in or Providing formalised or structured Mentoring or Training other than the ATAINZ Mentoring Program	Based on hours of involvement to a maximum of 5 hours

**Note:**

The minimum CPD Hours that can be claimed from a Formal Activity is 0.5 hours, and anything less than 0.5 cannot be claimed for CPD Hours.

A Half-Day Course is deemed as 4 Hours.

A Full-Day Course is deemed as 8 Hours.

Unstructured Activities	
Unstructured Activities	CPD Hours
<p>An activity that assists the Member grow as an individual, but does not involve structured study that relates to the Accountancy industry. Includes activities such as:</p> <ul style="list-style-type: none"> <li>- School Board of Trustees</li> <li>- Chamber of Commerce</li> <li>- Local Council</li> <li>- Toastmasters</li> <li>- Rotary</li> <li>- Lions</li> <li>- Justice of the Peace</li> <li>- Business Mentors</li> <li>- Institute of Directors</li> <li>- Property Investor Association</li> <li>- Other Voluntary Work for your Community</li> </ul>	5 Hours maximum

If a conference or course that you attended or completed is not on the above list please email ATAINZ ([admin@atainz.co.nz](mailto:admin@atainz.co.nz)) to see if they are eligible for Continuing Professional Development Hours.

# Continuing Professional Development

## **Members who join ATAINZ during the Year**

Members who join ATAINZ during the year will have a CPD Hour requirement prorated based on the number of months that they have been a member in the calendar year.

(ie: if you join in June that is 6 months, so  $6/12 \times 25 = 12.5$  CPD hours requirement).

## **Continuing Professional Development Hours Audits**

All ATAINZ Members will be subjected to random audits as regards their Continuing Professional Development Hours. These Audits will require confirmation of attendance at Formal Activities and proof of completion of Informal Activities.

Failure of a Member to obtain the required annual Continuing Professional Development Hours may result in their Membership to ATAINZ being suspended or terminated, subject to Board consideration.

## **Continuing Professional Development Hours Declaration**

Your Annual Continuing Professional Development Hours Declaration must be made online via the ATAINZ website by the 31<sup>st</sup> March for the previous years' declaration.

On the 1<sup>st</sup> April Continuing Professional Development Hours will "roll forward" to the current year to enable you to commence updating your CPD Hours.

Please note that you can continue to update your CPD Hours throughout the year until we "roll forward" to the next year.