



# **The Institute of Chartered Secretaries and Administrators in Canada**

## **APPLICATION FOR REINSTATEMENT:**

**ACIS**

**FCIS**

Please note:

**A short letter outlining your reasons for seeking reinstatement and providing information on what contribution you foresee yourself making to your own career, the profession, your community, and to the Institute should accompany this application form. This letter serves as your personal introduction to the Admissions Committee.**

**A detailed resume, a company profile, and an organization chart showing your position within the company should also accompany this application form.**

**To:** The Committee for Canada of The Institute of Chartered Secretaries and Administrators in Canada

I offer myself for re-election to The Institute as an Associate (ACIS) or Fellow (FCIS) and agree to be bound by the Charter, Bye-laws, Canadian Bylaws, and Rules of The Institute.

I enclose \$53.00 in payment of application fee and agree to pay any outstanding subscriptions and/or annual subscriptions due upon receipt of invoice.

Signature \_\_\_\_\_ Date \_\_\_\_\_

**Please read the attached notes carefully before completing and use block capitals or typescript, throughout.**

Surname \_\_\_\_\_ Prefix \_\_\_\_\_

Other Names \_\_\_\_\_ Initials \_\_\_\_\_

*Any diploma issued will bear the names given above, which should therefore be in full.*

Date of Birth \_\_\_\_\_ Date of election as an Associate (if applicable) \_\_\_\_\_

Degrees and other designations held \_\_\_\_\_

Home Address \_\_\_\_\_ Tel Number \_\_\_\_\_

\_\_\_\_\_ Fax Number \_\_\_\_\_

\_\_\_\_\_ Email \_\_\_\_\_

Present Employer \_\_\_\_\_ Tel Number \_\_\_\_\_

Job Title \_\_\_\_\_ Fax Number \_\_\_\_\_

Business address \_\_\_\_\_ Email \_\_\_\_\_

\_\_\_\_\_

*Please indicate which address is to be used for correspondence.*

## CHARACTER AND STANDING

Yes No

1 Are you an undischarged bankrupt or are your affairs currently subject to an arrangement with creditors or other external administration or are any such proceedings pending against you?

2 Within the past five years have you been convicted of any offence of such a nature that, had you been a member of the Institute at the time, would have been likely to have given rise to disciplinary action being taken against you by the Institute under the By-laws and Charter?

3 Within the past five years, have you conducted yourself, whether by act or default, in a manner that, had you been a member of the Institute at the time, might or is likely, to have been discreditable to the Institute having regard to the Institute Code of Ethics?

Current Salary:  Up to \$60,000  \$60,000 - \$100,000  Over \$100,000

**SECONDARY EDUCATION**

University or College degree(s)	Dates From                  To	Full time or part time	Degrees obtained

**OTHER PROFESSIONAL QUALIFICATIONS/DESIGNATIONS**

Name of professional body	Designatory letters	Date of examinations completed	Date elected to membership

**TOTAL LENGTH OF RELEVANT PROFESSIONAL EXPERIENCE (in years)** \_\_\_\_\_

**ACTIVE INVOLVEMENT IN INSTITUTE AFFAIRS OR RELATED PROFESSIONAL MATTERS**


**FORM OF RECOMMENDATION**

We the undersigned, having known the above named for the period noted, hereby recommend him/her, from personal knowledge for election as a Fellow/Associate (circle one) of the Institute and, if appropriate, Professional Administrator

1. Name \_\_\_\_\_ Profession/Occupation/Title \_\_\_\_\_  
 Company \_\_\_\_\_ Period of years known \_\_\_\_\_  
 Address \_\_\_\_\_  
 \_\_\_\_\_ Insert FCIS/ACIS \_\_\_\_\_  
 \_\_\_\_\_ (if a Chartered Secretary)

Signature \_\_\_\_\_ Date of signature \_\_\_\_\_

2. Name \_\_\_\_\_ Profession/Occupation \_\_\_\_\_  
 Company \_\_\_\_\_ Period of years known \_\_\_\_\_  
 Address \_\_\_\_\_  
 \_\_\_\_\_ Insert FCIS/ACIS \_\_\_\_\_  
 \_\_\_\_\_ (if a Chartered Secretary)

Signature \_\_\_\_\_ Date of signature \_\_\_\_\_

## LIST OF RECENT POSITIONS HELD

A detailed curriculum vitae should also be provided.

Name of Organizaton \_\_\_\_\_

Job Title \_\_\_\_\_

Dates: From \_\_\_\_\_ To \_\_\_\_\_

Referee: Name \_\_\_\_\_ Office Held \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Name of Organizaton \_\_\_\_\_

Job Title \_\_\_\_\_

Dates: From \_\_\_\_\_ To \_\_\_\_\_

Referee: Name \_\_\_\_\_ Office Held \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Name of Organizaton \_\_\_\_\_

Job Title \_\_\_\_\_

Dates : From \_\_\_\_\_ To \_\_\_\_\_

Referee: Name \_\_\_\_\_ Office Held \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Name of Organizaton \_\_\_\_\_

Job Title \_\_\_\_\_

Dates: From \_\_\_\_\_ To \_\_\_\_\_

Referee: Name \_\_\_\_\_ Office Held \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

The referee should in each case be a senior officer in the organization concerned. The referee is asked to certify from personal knowledge that the information, given by the applicant in the section next to the referee's signature, is correct. The referee is invited to provide any remark or amplification considered relevant, in a supporting letter. Where the applicant is unable to provide a signature an explanation should be provided (i.e: retired)

**APPLICATION FOR MEMBERSHIP  
NOTES CONCERNING THE COMPLETION OF THE FORMS**

**Please read the following notes before completing the form.** If you have any queries about any aspect of your application, or would like to discuss it before filling in the form, contact Chartered Secretaries Canada by email ([icsa@attcanada.ca](mailto:icsa@attcanada.ca)) or telephone (613-595-1151, 1-800-501-3440).

When you submit the form, please check that:

1. it has been signed and dated
2. it contains all the supporting documentation required
  - a detailed resume/curriculum vitae
  - an organizational chart showing your current position within the company
  - a detailed description of the company, including number of employees and annual earnings
3. it contains all the supporting signatures required
4. the appropriate application fees (including GST) are attached:

**ELIGIBILITY**

The Institute's membership is made up of Fellows and Associates. Requirements for election to membership is as follows:

**Associates:** To be elected an Associate (ACIS):

- you must have passed the Institute's examinations that you are not exempt from
- you must satisfy the Committee that, you are fit and proper to be elected
- your main occupation for at least 3 years, or for periods totalling at least 3 years, must have been in one or more positions that are relevant to the profession of being a Chartered Secretary, or alternatively you must have completed any other professional development that the Committee decides on
- you must give the Committee any information it requires about your duties and any organisation you have served

**Fellows:** To be elected a Fellow (FCIS):

- you must have passed the Institute's examinations that you are not exempt from
- you must satisfy the Committee that, considering your own character and your position, you are fit and proper to be elected
- your main occupation for at least 8 years in total, and for 3 years in the last 10 years, must have been as:
  - a secretary, or assistant secretary
  - a senior executive or in an administrative position that, in the Committee's opinion, has at least the same status as a secretary or assistant secretary
  - a senior academic in a university, or other higher or further education body
  - a member in public practice
  - or alternatively, you must have completed any other professional development that the Committee decides on
- any experience must have been with one or more organisations that, in the Committee's opinion, justifies electing the person as a Fellow
- you must give the Committee any information it requires about your duties and any organisation you have served.

**Professional Administrator**

Individuals meeting the criteria for election to Associate or Fellow and with at least 3 years North American (including Bermuda) work experience, may also apply for the Canadian designation of Professional Administrator (P.AdM.)

**Graduates** When individuals have passed the applicable Institute's examinations, they become Graduates.

- A Graduate is not a member of the Institute, and is not entitled to vote at any general meetings. .
- A Graduate is, however, subject to the same disciplinary rules as a member. .
- A Graduate must pay an annual subscription, but this will not be more than the subscription for Associates. .
- Graduates may describe themselves as Graduates of the Institute, and use the letters 'Grad ICSA' after their name. However, they must not describe themselves as a Chartered Secretary.
- Graduates should apply to become either an Associate or a Fellow within 10 years of becoming a Graduate.

## **CHARACTER AND STANDING**

In order to satisfy the fit and proper person requirements laid down in the By-laws, you are directed to answer all questions in this section. Where the answer to any of the questions is YES, you must give details on a separate sheet.

## **INCORRECT OR MISLEADING INFORMATION**

If information is revealed inaccurate or misleading, before or after election, then the application is liable to be rejected. Furthermore, if you are currently a Graduate, Associate, or Fellow, such misleading information may lead to disciplinary action under the Bye-laws.

## **RELEVANT EXPERIENCE**

Relevant experiences can be obtained in one or more organizations and in any type of organization. Some of the major relevant work areas include: general management and administration, accounting and financial management, company secretarial and legal work, pensions, insurance, information systems management and committee administration.

Two specific points to note are:

1. Teaching of ICOSA-related or otherwise approved subjects may be considered relevant. However, primary or secondary school teaching is generally not.
2. An applicant whose work is not considered entirely relevant, but contains an element of administrative or relevant duties, may have this proportion of their time counted, on a pro rata basis. The employer should be asked to provide a letter certifying the percentage of the applicant's time spent on such duties. However, in such cases, either:
  - a) at least one third of the required period of work experience must be spent in an administrative post; or
  - b) the applicant must be holding an administrative post at the time of application.

Applicants must submit an organizational chart showing their position within the company. A detailed description of the company, including number of employees and annual earnings, must also be provided as characterized below:

- Size 1 undertaking is a corporation with annual sales of less than \$10 million with employees of less than 100, concentrated in one location. For public authorities, an annual budget of less than \$20 million should be substitutes for the sales figure.
- Size 2 undertaking is a corporation with annual sales of up to \$50 million with up to 500 employees, concentrated in more than one location. The public service equivalency is a budget between \$20 million and \$100 million.
- Size 3 undertaking is a corporation with annual sales of up to \$500 million with up to 5,000 employees, concentrated in more than one location. The public service equivalency is \$1 billion.
- Size 4 undertaking is anything in excess of the foregoing.

## **LIST OF RECENT POSITIONS HELD**

1. Applicants are required to give a FULL CAREER RECORD (completing this on additional sheets if necessary). This should cover the period from leaving school until the present, with any gaps being accounted for. A detailed resume/curriculum vitae must also accompany the application.
2. Signatures from one or more referees must certify a total period of employment of not less than six years
3. If as an alternative to having your application form certified, you prefer to forward original reference letters from employers, please note that these must show the positions held and dates (i.e. month and year) of starting and finishing
4. Please note the following with regard to the individual sections of this page of the form
  - Name of organization: In the case of a holding company, a group, or subsidiary companies, it is important to specify the particular company in which you hold office.
  - Title of appointment: If the duties performed are not self-evident from the title, a brief outline of duties should be attached-
  - Dates: Month and year to be given.

## **RECOMMENDATIONS**

Two signatories of professional status, one of whom should, if possible, be a member of the Institute (Associate or Fellow) and both of whom should have known the applicant for more than one year, must recommend applicants for membership.

THE COMPLETED FORM AND SUPPORTING DOCUMENTATION SHOULD BE SENT TO:  
Chartered Secretaries Canada  
202-300 March Road  
Ottawa, ON Canada K2K 2E2