



Chartered Secretaries Canada

The Institute of Chartered Secretaries and Administrators in Canada

APPLICATION FOR ICSA DESIGNATION

Please ensure that your completed application form includes the following items:

- **Introduction Letter** as described on page 5;
- **Detailed Resume/CV** as described in the section of the form on *List of Positions Held*;
- **Organizational Chart** as described on page 5;
- Your current **Company Profile** as described on page 5;
- **\$105.00 CA**;
- All **supporting signatures** and any **related documents**.
- **Your signature** and **date**.

Please include both a hard copy and an electronic copy (e.g., scans on a CD) of all documents.

Chartered Secretaries Canada

202-300 March Road Ottawa, ON Canada K2K 2E2

T 613-595-1151; 1-800-501-3440 • Fax: 613-595-1155 • info@icsacanada.org • www.icsacanada.org

APPLICATION FOR ICSA DESIGNATION

PLEASE CAREFULLY READ AND FOLLOW THE INSTRUCTIONS ON THIS FORM. PLEASE TYPE.
 PLEASE INCLUDE A SIGNED COPY OF THIS COMPLETED FORM IN YOUR SUBMISSION PACKAGE.

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

I offer myself for election to The Institute of Chartered Secretaries and Administrators (ICSA) as an Associate (ACIS) if deemed appropriate and agree to be bound by the Charter, Bye-laws, Canadian Bylaws, and Rules of The Institute of Chartered Secretaries and Administrators.

I enclose **\$105.00** in payment of application fees and agree to pay annual subscriptions due upon receipt of notice. HST 11896 9427 RT0001

Signature _____ Date _____

Please provide your full name; any diploma or certificate issued will bear this name.

Name _____
Surname Given Names Initials

Date of Birth _____ (mm/dd/yyyy) Date of election as an Associate (if applicable) _____ (mm/dd/yyyy)

Degrees and other designations held _____

Home Address _____
Street City Province Postal Code

Tel Number _____ Fax Number _____ Email _____

Present Employer _____

Job Title _____

Business Address _____
Street City Province Postal Code

Tel Number _____ Fax Number _____ Email _____

Please indicate which address is to be used for correspondence: Home Business

Please indicate the email(s) to be used for correspondence Both Home Business

CHARACTER AND STANDING

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

() Please indicate the number of separate sheets you are including for this section. If you are not including any additional sheets, write "0".

Yes No

- 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?
- Within the past five years have you been convicted of any offence of such a nature that, regardless of whether you had been a member of the Institute of Chartered Secretaries and Administrators at the time, would have been likely to have given rise to disciplinary action being taken against you by the Institute of Chartered Secretaries and Administrators under the Bye-laws and Charter?
- Within the past five years, have you conducted yourself, whether by act or default, in a manner that, regardless of whether you had been a member of the Institute at the time, is outside of what is stipulated by ICSA's code of ethics or is otherwise discreditable to the Institute of Chartered Secretaries and Administrators?

POST-SECONDARY EDUCATION

(___) Please indicate the number of separate sheets you are including for this section. If you are not including any additional sheets, write "0".

University or College	Dates		Full time or Part time	Degrees obtained
	From	To		

PROFESSIONAL QUALIFICATIONS/DESIGNATIONS

(___) Please indicate the number of separate sheets you are including for this section. If you are not including any additional sheets, write "0".

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

ACTIVE INVOLVEMENT IN INSTITUTE AFFAIRS OR RELATED PROFESSIONAL MATTERS

(___) Please indicate the number of separate sheets you are including for this section. If you are not including any additional sheets, write "0".

FORM OF RECOMMENDATION

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.

(___) Please indicate the number of separate sheets you are including for this section. If you are not including any additional sheets, write "0".

We the undersigned, having known the applicant for the period noted, hereby recommend him/her, from personal knowledge for election as an Associate of The Institute of Chartered Secretaries and Administrators.

Name: _____

Name: _____

Title: _____

Title: _____

Company: _____

Company: _____

Telephone: () _____

Telephone: () _____

Address: _____

Address: _____

If a Chartered Secretary, please indicate: FCIS ACIS

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*Period of years you have known Applicant: _____

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Signature _____ Date _____

Signature _____ Date _____

LIST OF RECENT POSITIONS HELD

(___) Please indicate the number of separate sheets, not including your resume/cv, you are including for this section. If you are not including any additional sheets, write "0".

1. A detailed resume/curriculum vitae must also accompany the application. Applicants are required to provide a FULL CAREER RECORD (completing this on additional sheets if necessary). This should cover the period from leaving school until the present, including accounting for any gaps.
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:
 - 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 job title, a brief outline of duties should be attached.
5. The referee should, in each case, be a senior officer in the organization. The referee is asked to certify from personal knowledge that the information 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 must be provided.

Name of Organization _____

Job Title _____

Dates: (mm/yyyy) From _____ To _____

Referee: Name _____

Job Title _____

Tel: _____

Email: _____

Signature _____ Date _____
(mm/dd/yyyy)

Name of Organization _____

Job Title _____

Dates: (mm/yyyy) From _____ To _____

Referee: Name _____

Job Title _____

Tel: _____

Email: _____

Signature _____ Date _____
(mm/dd/yyyy)

Name of Organization _____

Job Title _____

Dates: (mm/yyyy) From _____ To _____

Referee: Name _____

Job Title _____

Tel: _____

Email: _____

Signature _____ Date _____
(mm/dd/yyyy)

Name of Organization _____

Job Title _____

Dates: (mm/yyyy) From _____ To _____

Referee: Name _____

Job Title _____

Tel: _____

Email: _____

Signature _____ Date _____
(mm/dd/yyyy)

TOTAL LENGTH OF RELEVANT PROFESSIONAL EXPERIENCE (in years) _____

(___) Please indicate the number of separate sheets you are including for this section. If you are not including any additional sheets, write "0".

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 ICSA-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 responsibility, 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.

APPLICATION FOR ICSA DESIGNATION NOTES CONCERNING THE COMPLETION OF YOUR APPLICATION

Please read the following notes for help with your submission. 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 (info@icsacanada.org) or telephone (613-595-1151; 1-800-501-3440).

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

ELIGIBILITY

Graduates

When individuals have passed the necessary IQS examinations, they become Graduates.

Graduates are:

- not members of the Institute, and are not entitled to vote at any general meetings;
- however, subject to the same disciplinary rules as members;
- must pay an annual subscription, but this will not be more than the subscription for Associates;
- may describe themselves as Graduates of the Institute, and use the letters 'Grad ICSA' after their name.

However, Graduates 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.

Associates (ACIS)

Under Bye-law 6, the basic requirements for election to Associate (ACIS) are as follows:

- To have passed the Institute's qualifying examinations;
- To be a fit and proper person;
- To have had as 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;
- With regard to working experience, the Council shall have power in the case of any candidate holding a degree of a university recognized by the Council as being of suitable academic standing, or a diploma or other certificate recognized as equivalent to a degree of such a university, or in the case of any candidate holding a professional qualification recognized by the Council as justifying such dispensation, to reduce at its discretion by not more than three years the period of six years specified in the ICSA Bye-law 6;

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.

SUPPORTING DOCUMENTS

INTRODUCTION LETTER

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

ORGANIZATIONAL CHART

Applicants must submit an organizational chart showing their position within the company.

CURRENT COMPANY PROFILE

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 substituted 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 of 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.

THE COMPLETED FORM AND SUPPORTING DOCUMENTATION SHOULD BE SENT TO:

Chartered Secretaries Canada, 202-300 March Road Ottawa, ON Canada K2K 2E2 / Fax: 613-595-1155 • Email: info@icsacanada.org