

## Application for ICSA Designation

**PLEASE NOTE:**

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 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 election to The Institute as an Associate (ACIS) or Fellow (FCIS) as deemed appropriate and agree to be bound by the Charter, Bye-laws, Canadian By-laws, and Rules of The Institute.

I enclose \$100.00 + 5% GST for a total of **\$105.00** in payment of application fees and agree to pay annual subscriptions due upon receipt of invoice.

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

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

Name \_\_\_\_\_  
Surname Given 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 \_\_\_\_\_  
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

**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?

**POST-SECONDARY EDUCATION**

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

**PROFESSIONAL QUALIFICATIONS/DESIGNATIONS**

Name of professional body	Designatory letters	Date 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 or Associate of The Institute. *(A letter of reference is optional)*

Name: \_\_\_\_\_ Title \_\_\_\_\_

Company: \_\_\_\_\_ Telephone: (      ) \_\_\_\_\_

Address: \_\_\_\_\_  
Street City Province Postal Code Country

If a Chartered Secretary, please indicate:  FCIS  ACIS \*Period of years you have known Applicant: \_\_\_\_\_

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

Name: \_\_\_\_\_ Title \_\_\_\_\_

Company: \_\_\_\_\_ Telephone: (      ) \_\_\_\_\_

Address: \_\_\_\_\_  
Street City Province Postal Code Country

If a Chartered Secretary, please indicate:  FCIS  ACIS \*Period of years you have known Applicant: \_\_\_\_\_

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

## LIST OF RECENT POSITIONS HELD

A detailed curriculum vitae should also be provided.

Name of Organization \_\_\_\_\_

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

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

Referee: Name \_\_\_\_\_ Job Title \_\_\_\_\_

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

Name of Organization \_\_\_\_\_

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

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

Referee: Name \_\_\_\_\_ Job Title \_\_\_\_\_

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

Name of Organization \_\_\_\_\_

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

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

Referee: Name \_\_\_\_\_ Job Title \_\_\_\_\_

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

Name of Organization \_\_\_\_\_

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

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

Referee: Name \_\_\_\_\_ Job Title \_\_\_\_\_

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

Name of Organization \_\_\_\_\_

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

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

Referee: Name \_\_\_\_\_ Job Title \_\_\_\_\_

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

## 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 (info@icsacanada.org) or telephone (416-944-9727, 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 from which you are not exempt.
- 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 6 years, or for periods totalling at least 6 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

*The Committee for Canada can reduce the 6 year qualifying period by up to 3 years where a person has:*

- a degree from a university which the Committee for Canada considers of suitable academic standing
- a diploma or other certificate which is nationally recognised as being equivalent to a degree from such a university
- a professional qualification which the Committee for Canada recognises as justifying the reduction
- completed any other professional development that the Committee for Canada decides justifies a reduction.

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

- you must have passed the Institute's examinations from which you are not exempt.
- 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.

**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 meeting.
- 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 ICOSA' 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 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.

## INCORRECT OR MISLEADING INFORMATION

If information is revealed to be 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 By-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 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.

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 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.

## LIST OF RECENT POSITIONS HELD

1. 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. 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  
FAX: 613-595-1155 • EMAIL: info@icsacanada.org