

Use this form to apply for Recognition of Prior Learning (RPL) if you have completed studies that are equivalent to ATL001 CTA1 Foundations. An application fee of \$215 applies, this is non-refundable. Refer to taxinstitute.com.au/education for policies and fees. Please retain original copy for your records. HEPCO Pty Ltd trading as The Tax Institute Higher Education. ABN 30 642 863 787.

FORM B | WD

Date of issue: July 2025

1 Candidate information

Candidate ID:			
Title:	☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other (please specify)	Date of birth:	DD/MM/YYYY
First name*:		Last name*:	

*This will appear on your testamur.

2 Contact information

☐ Please update my details

Personal details:

Home address:			
Suburb / City:		State:	
		Postcode:	
Country:			
(if outside Australia)			
Email:			
Home tel:		Mobile:	

Employment/Business details:

Company:		Position:	
Address:			
Suburb / City:		State:	
		Postcode:	
Country:			
(if outside Australia)			
Bus tel:		Bus fax:	

3 Evidence table

The Tax Institute Higher Education subject details	The Applicant's subject/s studied
Name of Education Provider The Tax Institute Higher Education	Name of previous Education Provider/s: Is the institution which you completed your studies recognised by the regulator/s and/or accredited? (see tpb.gov.au or training.gov.au or teqsa.gov.au/national-register) ☐ YES ☐ NO
Subject Applied for CTA1 Foundations	Subject/s Studied:
Code ATL001	Code:
Credit Point Value 6	Credit Point Value:
Contact Hours 10-15 hours per week	Contact Hours:
Subject Duration 12 weeks	Subject/s Duration, Year of Study:
Assessments ☒ Online checkpoint tests ☒ Final Exam	Assessments Completed (highlight relevant): ☐ Formal exam ☐ Assignment ☐ In class exam ☐ Other:
Is there any relevant experience that has extended the learning of the topic/subject? ☐ YES (add attachment, see Other Evidence, Section 4 Checklist) ☐ NO	
LEARNING OUTCOMES from The Tax Institute Higher Education subject modules	LEARNING OUTCOMES Applicant to insert Learning Outcomes from the subject/s studied
ATL001.1 TASA 2009 and the Code of Professional Conduct – The objects of TASA 2009 – Registration under TASA 2009 – The Code of Professional Conduct – Sanctions and Penalties	Matched Learning Outcomes:
ATL001.2 Introduction to the Australian Tax System – Source and purpose of tax law – The Australian tax system – The tax agent services framework – The income tax formula – Australia's jurisdiction to tax – Medicare levy & Medicare levy surcharge – Tax offsets, study and training support loans – Reportable fringe benefits – Tax and the sharing economy	Matched Learning Outcomes:

LEARNING OUTCOMES from The Tax Institute Higher Education Subject modules	LEARNING OUTCOMES Applicant to insert Learning Outcomes from the Subject/s studied
ATL001.3 Calculating Tax Payable and Assessable Income - Calculating tax payable - Assessable income – Ordinary income - Assessable income – Statutory income - Income which is not assessable - Personal services income	Matched Learning Outcomes:
ATL001.4 Deductions - General deductions - Specific deductions - Deduction denial provisions - Asset financing deductions - Primary production deductions	Matched Learning Outcomes:
ATL001.5 Structures - Sole traders - Partnerships - Trusts - Companies - Superannuation funds	Matched Learning Outcomes:
ATL001.6 Goods and Services Tax - Taxable supplies - Creditable acquisitions and claiming input tax credits - Non-taxable supplies - Registration - Tax periods - Tax invoices - Accounting for GST: cash versus accruals - Mechanics of accounting for GST - Cash flow issues - Activity statements	Matched Learning Outcomes:
ATL001.7 Capital Gains Tax - Introduction to capital gains tax - CGT asset - Common CGT events - Calculating capital gains/losses - Main residence exemption - Small business relief	Matched Learning Outcomes:
ATL001. 8 Fringe Benefits Tax - Key concepts - Types of benefits - Exemptions - Contribution by employees towards the fringe benefit - Otherwise deductible rule - Car fringe benefits - Other common types of fringe benefits briefly explained - FBT and GST - FBT collection and recovery provisions - State taxes	Matched Learning Outcomes:

4 Checklist

Compulsory Evidence

- ☐ Completed the Evidence Table in Section 3 – if not completed, Application will not be assessed
- ☐ Attached certified copies of all relevant Academic Transcripts showing Institutions where study was undertaken
- ☐ Attached a Unit / Subject Outline studied at the previous educational institution, subjects and subject codes must match the Subjects and Subjects codes on supplied Academic Transcript
- ☐ Evidence of relevant professional experience – copy of your current Résumé

Other Evidence:

- ☐ Letter from your employer confirming you have the required relevant Australian tax experience
- ☐ Evidence of current membership of a law institute or society, the IPA, CPA, ICAA or a practising certificate
- ☐ Evidence of satisfaction of continuing professional development (CPD) requirements

Other:

5 Candidate Declaration

I confirm that I have read and accept The Tax Institute Higher Education's policies and procedures (see taxinstitute.com.au/education for policies and fees), including:

- Enrolment,
- Deferring and Withdrawing,
- Membership, and
- Recognition of Prior Learning

I hereby declare that the information in this application is true and correct.

Full name: (please print)

Signature:

Date of signature:

DD/MM/YYYY

6 Payment

On completion of this form your application will be submitted for processing. Once completed, you will be contacted for payment, or you may submit the "Payment Authorisation Form".

Please complete this form and return by email to taxeducation@taxinstitute.com.au. Please refer to taxinstitute.com.au/education for policies and fees. Please retain original copy for your records. HEPCO Pty Ltd trading as The Tax Institute Higher Education. ABN 30 642 863 787.

FORM WD

1 Contact information

☐ Please update my details

Candidate ID:

Title: ☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other (please specify)

First name: Last name:

Company:

Email:

Postal address:

Suburb / City: State: Postcode:

Country:
(if outside Australia)

Phone: Mobile:

Privacy: HEPCO Pty Ltd, trading as The Tax Institute Higher Education (HEPCO), a subsidiary of The Tax Institute ("TTI"), together with TTI collects, uses, holds and discloses personal information in accordance with TTI's Privacy Policy. By submitting your application to HEPCO, you confirm that you have read TTI's Privacy Policy and you consent to your personal information being collected, used and held by TTI and disclosed to third parties in accordance with TTI's Privacy Policy. TTI's Privacy Policy is available at taxinstitute.com.au/about-us/privacy-copyright-disclaimer.

2 Payment method

Please charge \$ to my ☐ AMEX ☐ Visa ☐ MasterCard

Name on card:

Card no.: Expiry date: Cardholder's signature:

For further information please contact us on **1300 829 338** or email taxeducation@taxinstitute.com.au.

To apply

Email taxeducation@taxinstitute.com.au
Mail Level 21, 60 Margaret Street, Sydney NSW 2000
Call 1300 829 338

Submit form