

# TAX PATHWAY

## TRANSFER FORM

### TRANSFERRING

If you are a registered Association of Taxation Technicians (ATT) student and have passed **no** more than two ATT written papers (regardless of whether or not you have passed either or both of the Computer Based Examinations in Professional Responsibilities & Ethics and Law) you may apply to transfer the unexpired period of your five year ATT student registration and become a Tax Pathway student. A fee of £160 is payable on transfer.

**If you have less than six months of your ATT student registration remaining you will need to register as a new Tax Pathway student on a different form/online.**

If you have between six months and one year of your ATT student registration remaining please think carefully about whether or not it is achievable to complete the Tax Pathway in a year and if this is not the case you may prefer to register as a new student on the Tax Pathway.

Your existing passes will be transferred with you and those passes will remain valid indefinitely under Core 1. (Passes in the Computer Based Examination/s are valid for nine sittings of the written examinations from the date they were achieved.)

### PERSONAL DETAILS

ATT Student Registration Number:

Surname:

Title:

Forename(s):

Date of Birth:

Home Address:

Postcode:

Work Name

Work Address:

Work Postcode:

Mobile Number:

Email:

*A valid email address, either home or work, is mandatory and may be used to send important information to students.*

Preferred email correspondence address:

Home:

Work:

## PROFESSIONAL CONDUCT

Have you ever been convicted of any offence in any court in the UK or elsewhere (other than a motoring offence which did not result in disqualification)?

Yes:  No:

*Note: Under the Rehabilitation of Offenders Act 1974 a person is not obliged to disclose spent convictions other than those which carried a sentence of imprisonment exceeding 30 months.*

Have you ever been the subject of disciplinary action by a professional body, tribunal or regulatory authority?

Yes:  No:

Have you ever been adjudged bankrupt or entered into a voluntary arrangement with creditors?

Yes:  No:

Have you ever been disqualified as a director?

Yes:  No:

Are there any other factors relating to your application that should be taken into consideration?

Yes:  No:

**If you have answered “yes” to any of the questions please give full details below and a separate sheet, if necessary.**

**Please note:** All the above fields are in relation to Professional Conduct issues only, and any other factors that may affect your application (such as requiring extra time to sit your examinations or previous qualifications) are not relevant at this point. If you answer Yes to any of the above questions please supply as much detail as possible and also upload any supporting documentation. When your application is processed this information will be reviewed by a panel who will make a decision on your suitability to register as an Tax Pathway student. If approved your registration will then be processed accordingly. Please be aware that there may be a short delay whilst your application is assessed.

## EXAMINATION PASS LIST

After every examination session, the Association and the Institute publish a list of candidates who have successfully passed each of their respective examinations. Pass lists are published via the Association’s and Institute’s websites, as well as in Tax Adviser Journal. If you do not wish to have your name listed on an examination pass list, please contact the Association or Institute at [education@tax.org.uk](mailto:education@tax.org.uk).

## DATA PROTECTION ACT

The Association and the Institute may, under data protection legislation, collect personal data about students in order to deliver services, as well as to gather statistics for research in order to improve the quality of our services. All personal data is stored in a secure and confidential manner. Data may also be disclosed to external organisations or individuals, including tuition providers and partner institutions, whose services may be of interest to you.

Any data which is classed as sensitive personal data under the Data Protection Act 1998 will not be disclosed by the Association or the Institute to any external organisation, unless we have a legal obligation to do so or such disclosure is essential to the delivery of Association or Institute services requested by a student (such as notifying an examination centre of a student's medical condition).

Please tick this box if you are willing to have such information disclosed.

## DECLARATION

I declare that to the best of my knowledge the information I have provided is true and correct. I understand that my Tax Pathway registration fee is non-refundable\* (unless the application is unsuccessful) and is payable in addition to entry fees for the examinations.

\*Please note if your situation changes significantly within a month of the date you made your application for student registration and you no longer wish to proceed (provided you have not registered for any examinations) then a refund can be made, less a small administration charge.

I agree that, if registered, as a Tax Pathway student with the Association of Taxation Technicians (ATT) and the Chartered Institute of Taxation (CIOT), I will comply with and be bound by the Association's Articles of Association and any Regulations there under, the Charter, Byelaws and Regulations of the Institute, including Professional Rules and Practice Guidelines and Professional Conduct in Relation to Taxation, which are for the time being in force and which have application to registered students. I understand that as a registered Tax Pathway student I have an ongoing obligation to promptly inform the Association and Institute if:

- I am convicted of a criminal offence (other than a 'summary only' road traffic offence) or is charged with any financial crime such as fraud or money-laundering;
- I am notified of disciplinary and/or regulatory action begun against me by another professional body to which I belong or by a regulator;
- I am notified of disciplinary action for misconduct/gross misconduct or am dismissed for misconduct/gross misconduct by my employer;
- I have a bankruptcy order made against me;
- I enter into a voluntary arrangement with creditors;
- I am disqualified as a director or trustee, or enter into a disqualification undertaking;
- I am aware of any matters which could bring into question my character or suitability to become a member of the Association or the Institute.

I also understand that this application for registration and any subsequent acceptance by the Association and Institute does not confer any of the benefits of membership of the Association and the Institute.

I am aware this application to become a Tax Pathway student does not constitute entry to the ATT or CTA examinations, which require separate applications and fees.

Signature:

Date:

## PAYMENT

Please select a payment option for the £160 transfer fee:

BACS / Internet Payment (UK banks only). Please state date paid: \_\_\_\_\_

Account name: Chartered Institute of Taxation

Sort Code: 40-03-17

Account no. 01049550

Enclosed cheque

Completed company invoice details below

*Please note that your registration will not be confirmed until payment has been received from your company.*

Company name:  
\_\_\_\_\_

Contact name:  
\_\_\_\_\_

Address:  
\_\_\_\_\_  
\_\_\_\_\_

Email:  
\_\_\_\_\_

Contact No:  
\_\_\_\_\_

When completed, please return this form to:

**ATT | CIOT**  
**30 Monck Street, London SW1P 2AP**

Or email: [education@tax.org.uk](mailto:education@tax.org.uk)

**Please contact us if you require an enlarged print version of this form**