

**Contact Details of Existing Member Firm**

**Company Name and ACN**, if trading via a company (provide full description of trading entity, eg. ABC Pty Ltd ACN 123 123 123 ATF ABC Trust)

**Name of Individual Applicant(s)**, if trading as sole trader or as individuals in partnership

Name of Business

ABN

Postal Address

City

State

Postcode

Name and Position of Contact Person<sup>1</sup>

Phone No. for Contact Person

Fax

Mobile

Email address for APIV correspondence

<sup>1</sup> This Form must be completed and signed by a person authorised to act on behalf the member firm.



## Membership Fees

Number of individual applicants:

x \$297.00 per applicant incl GST =

\$

Number of corporate applicants:

x \$297.00 per applicant incl GST =

\$

Total payment including GST

\$

### Refund policy

Membership fees will **not** be refunded by the APIV unless an application for membership is declined.

## Payment Details

This document is a Tax Invoice/Receipt upon payment. Please retain a copy for tax purposes.

### Method of Payment

*(Please cross the appropriate box)*

- Bank Transfer Details once invoice is received:  
A/C Name: APIV Limited  
BSB: 062 909 (CBA)  
Account: 10 17 88 42  
Ref: invoice #

### Credit Card

Please charge by Credit Card *(mark one)*

- Visa                       Mastercard                       American Express  
*3% surcharge applies to American Express payments*

Card number

Name on card

Expiry

Amount

Signature

Date

- Tick this box if you require a tax invoice for the application fee

Australian Property Institute Valuers Limited  
ABN 49 143 638 975      ACN 143 638 975

**Applicant's Declaration**

I, being the person named below, declare that the information provided above and in the attachments is true and correct to the best of my knowledge and belief based on reasonable enquiries and that I am duly authorised to make such a declaration on behalf of the member firm.

**By submitting this application, you hereby agree to the following:**

- The Applicant(s) is/are financial member(s) of the Australian Property Institute ("API").
- The member firm will maintain a current policy of PI insurance that meets the requirements of the APIV Limited Scheme and I will maintain sufficient assets to cover the amount of excess (deductible) applicable.
- The member firm and the Applicant(s) will comply at all times with the provisions of the APIV Limited Constitution and By-Laws, the APIV Limited Scheme, APIV Limited Insurance Standards, the Supervision Guidelines, Policies, Procedures and Guidelines and the requirements of the Professional Standards Legislation.
- The member firm and the Applicant(s) will comply with the following:
  - Complete Professional Standards Legislation based surveys as requested by the APIV;
  - Provide information on notifications, claims and settlements and complaints to the APIV (promptly and on an on-going basis);
  - Immediately advise the APIV when any notification or claim approaches the monetary ceiling;
  - Provide PI insurance data to the APIV on an ongoing basis.
- All details of any notifications/ claims/settlements and complaints that have been notified and made against the Applicant(s) in the past two years have been attached.  
**Note:** the claims details required are: amount claimed, legal costs and the name of the broker (if any), subject matter of claim/complaint and the outcome/result/settlement, current status of the notification or claim.
- The Applicant(s) has/have read and consent to the Privacy Statement and Collection Notice detailed at the end of this Form.
- The Applicant(s) consent(s) to the APIV Limited providing de-identified data on notifications / claims / complaints and insurance data to the Professional Standards Councils to enable the APIV to discharge its obligations under the professional standards legislation.
- The Applicant(s) will display a limited liability disclosure statement on my/our business documents and promotional material in compliance with the requirements of the professional standards legislation and Professional Standards Councils.
- The Applicant(s) will comply with the API/APIV Limited requirements for continuing professional development.
- The Applicant(s) will provide evidence to APIV Limited of their compliance with the requirements, if requested by the APIV Limited.
- The Applicant(s) agree that the APIV Limited may audit their records to confirm my/our compliance with the requirements of membership of APIV Limited and in relation to the Scheme.

Signature of Applicant(s) or authorised person on behalf of member firm

Signature of applicant or authorised manager on behalf of the group

Date

Name and Title

## Privacy Statement

### Disclosure Statement and Member Consent

The Australian Property Institute Valuers Limited (APIV Limited) is committed to protecting the privacy of the personal information you provide to us.

### Who do we collect the personal information from?

Generally, we collect your personal information directly from you. However, in some cases, we may receive your personal information from a third party (for example, from your insurance Broker or if we receive a complaint).

### For what purposes do we collect personal information?

We collect your personal information to fulfil our functions and responsibilities under, and facilitate compliance with the Professional Standards Legislation and associated regulations, including:

- a) updating and maintaining membership records;
- b) communicating with you in relation to your membership of the Scheme;
- c) communicating with you to offer products, services and events and when you obtain a product or service or come to an event;
- d) to conduct research.

### Whom do we disclose the personal information to?

We may disclose the personal information we collect on this form and any additional information that you provide to us in connection with this application to:

- a) our relevant staff, contractors, professional advisors and Committee members involved in delivering our services.
- b) the Professional Standards Councils (PSC) any personal information which it is reasonably necessary for us to disclose for the purpose of fulfilling our scheme administration and reporting functions in accordance with professional standards legislation and as required by the PSC. Such disclosure may include:
  - i) reporting to the PSC on notifications/claims received by members; complaints and discipline; cost of insurance, etc. This data provided by APIV Limited to the PSC for the purposes of reporting is de-identified and aggregated;
  - ii) reporting to the PSC any breaches of compliance obligations by members; and
  - iii) reporting to the PSC where reasonably required to comply with any request by the PSC and/or any Notice issued by the PSC.
- c) to the Australian Property Institute ACN: 608 309 128 (API), which is an associated entity of the APIV, where such information is reasonably considered by the APIV Limited to be relevant to the performance by the API of its objects and purpose.

### Disclosure to the public

When other members of the APIV Limited or the public make enquiries, APIV Limited staff may provide them with your name, employment organisation and business telephone number and whether you are a member of APIV Limited.

**By completing and returning this application form and/or providing us with any additional information in connection with your application, you agree to us using and disclosing your information as set out above. By providing your email address you consent to receiving electronic correspondence from APIV Limited.**

**This consent to the use and disclosure of your personal information remains valid unless you alter or revoke it by giving written notice to the Scheme Administrator.**

### You can access and correct your personal information

APIV Limited will at any time provide access to you to verify the personal information we hold, and where necessary, correct any errors in this information (some restrictions and costs may apply).

In order for the Institute to provide you with membership services, we need your current contact information. If you change your name, postal address, employer, position, telephone, fax or email address at any time, you should advise the Scheme Administrator of these changes.

## Collection Notice

Australian Property Institute Limited (ACN 608 309 128), Australian Property Institute Valuers Ltd (ACN 143 638 975), and related entities (together **API**) collect your personal information to perform its functions and provide you with API's various services.

We need to collect the personal information requested on this form to enable us to process this membership application. If you do not provide us with the information or any additional information we request, we may not be able to process the membership application.

All personal and sensitive information is held by API and its staff in accordance with the API Privacy Policy. For further information about API's collection, use, disclosure, and management of personal information:

- (a) please read API's Privacy Policy at: <https://www.api.org.au/privacy-policy>; or
- (b) contact API's Privacy Officer via the following details:

The Privacy Officer  
Australian Property Institute  
PO Box 26, Deakin West ACT 2600, Australia  
Phone: 1800 111 274 or + 61 2 6282 2411  
Fax: +61 2 6285 2194  
E-mail: [privacy@api.org.au](mailto:privacy@api.org.au)

The purposes for which API collects your personal information are specified in clause 2 of the API Privacy Policy. Generally, you can deal with API without identifying yourself, however in certain circumstances it would be impractical to deal with you anonymously.

API's Privacy Policy also contains information about how you may:

- (a) access, or seek to request, the personal information API holds about you, at clause 14;
- (b) seek correction of your personal information held by API, at clause 15;
- (c) complain about a breach of API's privacy obligations and how API will handle such a complaint, at clause 19;

and includes information about the:

- (d) consequences if all or some of the personal and sensitive information is not collected by API, at clause 3;
- (e) entities, bodies or persons and types of entities, bodies or persons, from which API may collect personal information about you, at clause 5.6;
- (f) entities, bodies or persons and types of entities, bodies or persons, to which API usually discloses personal information, at clause 11.7, which specifically includes the Professional Standards Councils (PSC) and the Royal Institution of Chartered Surveyors (RICS); and
- (g) circumstances in which API is likely to disclose your personal information to overseas recipients, at clause 11.9.

When other members of API or the public make enquiries, API staff may provide them with your name, employment organisation, email address and business telephone number and whether you are a member of APIV Limited.

The countries in which overseas recipients of personal information are likely to be located are the United Kingdom, Singapore, the United States, Hong Kong and New Zealand, and otherwise in locations which are impracticable to specify, for example when API utilises cloud storage facilities.

By providing API with your personal information, you will be deemed to have read and accepted API's Privacy Policy, as amended from time to time, and the most recent version of which is made available on API's website at: <https://www.api.org.au/privacy-policy>.

Please ensure you have read and understood the API Privacy Policy prior to providing your personal information or contact the API Privacy Officer if you have any concerns.