



Chartered  
Institute of  
Taxation.

# Get the most from your CIOT membership



A man with a beard and glasses, wearing a light blue shirt and a grey cardigan, is clapping. A woman with long brown hair, wearing a white button-down shirt and light-colored trousers, is also clapping and smiling. They are standing in front of a bookshelf filled with books. The entire image has a purple tint.

# Welcome to your professional body

We are delighted that following your hard work and examination success you have joined the Chartered Institute of Taxation, you are now part of a 32,000+ global network of Chartered Tax Advisers working in the UK and throughout the world.

The CIOT is the leading professional body in the UK for advisers dealing with all aspects of taxation. As an educational charity our primary purpose is to promote education in taxation with a key aim of achieving a more efficient and less complex tax system for all.

# How to manage your membership

## Your Membership Benefits

This is a snapshot of the member benefits you can access:

- Free or low-cost seminars, webinars, meetings, and discussion groups, including discounted rates at our Annual Conferences (Spring and Autumn)
- A digital copy of the Annotated Finance Act year on year (as applicable)
- Tax Rate Cards – members can apply for up to 50 copies of a branded tax rate card for use in their offices or with clients
- A weekly technical e-newsletter
- Discounts on publications from our partnered publishers
- Appear in our online directory of Chartered Tax Advisers where you can advertise your specialist skills to the public and employers
- You can apply to use the Chartered Tax Adviser Practicemark [www.tax.org.uk/ciot-practicemark](http://www.tax.org.uk/ciot-practicemark)
- Tax Adviser Magazine [www.taxadvisermagazine.com](http://www.taxadvisermagazine.com)
- Access support to help you through a challenging situation from the Tax Adviser's Benevolent Fund [www.tax.org.uk/tabf](http://www.tax.org.uk/tabf)

To read more about your member benefits visit:

[www.tax.org.uk/cta-membership-overview](http://www.tax.org.uk/cta-membership-overview)

## Your Portal

As a student you will have become familiar with the Portal, where you managed exam bookings etc. The Portal remains the central place for you to manage your membership too.

Each year we will send you a notice for renewal in November by email. This will be a call to action for you to log in to the Portal and pay your subscription for the year ahead and submit your Annual Return for the previous year. Annual Subscriptions and Annual Returns are due by 31 January each year. You can submit and pay online through the Portal. Invoices marked paid are sent automatically to members by email and these can be used (where agreed) to expense the cost of your membership back to your employer.





# Join Future of Tax Professionals

**A Joint Committee with the Association of Taxation Technicians is focussed on serving members in the first 10 years of their career.**

The FTP committee host events such as development skills, networking, social events, technical and general interest topics that are particularly relevant to those in the early stages of their career. The FTP committee works collaboratively with the CIOT and ATT Branch Network to geographically widen the scope of their committee and the members they support.

[www.tax.org.uk/the-future-of-tax-professionals](http://www.tax.org.uk/the-future-of-tax-professionals)

## Your professional obligations

### Professional Standards

In setting high professional standards for CIOT members we help to protect the public interest and give those who use their services confidence that their Chartered Tax Adviser has the knowledge, skills and integrity they can expect from a professional. The independent Taxation Disciplinary Board may take disciplinary action if a member fails to comply with the standards. Please take the time to familiarise yourself with the Member Rules: [www.tax.org.uk/ciot-professional-standards-member-rules](http://www.tax.org.uk/ciot-professional-standards-member-rules)

### Anti-Money Laundering

If you are a business in the tax and accountancy sector you or your firm must be supervised. In essence this means sole practitioners and principals in partnerships/ limited liability partnerships and companies operating in that sector. For you or your firm to be supervised by the CIOT at least one principal in your business must be a member of the CIOT (Principal for these purposes means sole practitioner, equity partner, member of an LLP or company director at Companies House). There is a lot more information online:

[www.tax.org.uk/anti-money-laundering-aml](http://www.tax.org.uk/anti-money-laundering-aml) and if you have a query and cannot find the answer please contact: [aml@ciot.org.uk](mailto:aml@ciot.org.uk).

# Engaging with your tax community by region

## Branch Network

A Joint Network with the Association of Taxation Technicians bringing the profession together as a community via peer-to-peer learning and networking.

The Branch Network community is made up of a friendly volunteer group of CIOT and ATT members from your area, who will deliver an annual programme of events tailored to local members and students.

- Branch events include professional skills training, and other social events
- Free or low cost seminars, webinars, meetings, and discussion groups
- The chance to develop your technical expertise and obtain Continuing Professional Development (CPD) hours
- Valuable networking opportunities with likeminded professionals and a chance to practice your networking skills.
- Personal development including building and maintaining your professional status

## Join Your Community

When you applied to study CTA you were invited to select a Branch, now, as a member you can enrol onto more branches, perhaps one local to home or work or both. Branch events are an opportunity for training and development but, more than that, they are also a great way to meet other tax professionals working in your area. You can check to see which Branch you are in and add/change/ in the member area of your portal account.

## Get Involved

The CIOT wants to support members wherever they are, if you do not currently have an active branch in your area but you are interested in finding out more about what events and activities might be happening in your region or online, please contact: [branches@tax.org.uk](mailto:branches@tax.org.uk).

## Access Branch Webinars

Our CPD is accessible and inclusive, therefore, if you prefer to obtain content online, we offer an online programme of technical webinars and professional skills available at: [www.tax.org.uk/branch-webinars](http://www.tax.org.uk/branch-webinars)

In 2024, the Branch Network delivered 123 events, 73 of these were in-person CPD sessions or social events in the UK and Channel Islands attracting over 2,400 delegates.





## Conferences & events

We support members with their continuing professional development through educational webinars, high-quality conferences (both virtual and in person) and thought leadership events attracting expert speakers and tax specialists.

Our members receive access to our national events programme. Our events calendar plays an important role in making education in taxation accessible and inclusive with many events being offered free of charge or at a reduced, affordable rate.

### Global Events

The Chartered Institute of Taxation has licensed the Irish Tax Institute, The Tax Institute of Australia, the South African Institute of Taxation and the Taxation Institute of Hong Kong to use the designations 'Chartered Tax Adviser' (CTA). Since 2021 we have collectively produced a series of Global CTA seminars aimed at tax practitioners in these jurisdictions. Members are entitled to attend.

### Tax Charities

The CIOT are also proud to host virtual events on behalf of TaxAid and Tax Help for Older People, the two tax charities which we support. They provide vital services to those in need, please support them if you are able to.

8682 registrations for 30 events in 2024;  
17 virtual | 10 Face to Face | 3 Hybrid

# Your CIOT membership

Membership of the CIOT is an investment in your career and standing as a tax professional. The Chartered Tax Adviser (CTA) designation raises your profile, and highlights a commitment to upholding professional standards which provides confidence to businesses and the public.

As a CTA member you will belong to the largest and most influential body in tax. As a community of over 20,000 members in the UK and over 30,000 globally you can connect with fellow CTAs, volunteers, communities, speakers, policy-makers and influencers. Whatever your background, identity or experience we welcome you.

## Membership checklist

- Sign up to our online directory of Chartered Tax Advisers:  
**<https://pilot-portal.tax.org.uk/utilities/ciot/find-a-member>**
- Check your details are up to date on the portal:  
**<https://pilot-portal.tax.org.uk>**
- Update your preferences to receive relevant content via our email preference centre:  
**[www.tax.org.uk/preference-centre](http://www.tax.org.uk/preference-centre)**
- Check out our latest articles and news on Tax Adviser Magazine:  
**[www.taxadvisermagazine.com](http://www.taxadvisermagazine.com)**
- Listen to experts discuss the latest issues in tax, on Tax Adviser Podcasts:  
**[www.taxadvisermagazine.com/podcasts](http://www.taxadvisermagazine.com/podcasts)**
- Follow us on LinkedIn **[www.linkedin.com/school/466139/](http://www.linkedin.com/school/466139/)**
- Join the Future of Tax Professional LinkedIn Group **[www.linkedin.com/groups/8160878/](http://www.linkedin.com/groups/8160878/)**
- Find out about more benefits at: **[www.tax.org.uk/cta-membership-overview](http://www.tax.org.uk/cta-membership-overview)**



E: [membership@tax.org.uk](mailto:membership@tax.org.uk)  
[www.tax.org.uk](http://www.tax.org.uk)

