

CHANGE IN MEMBERSHIP REQUEST FORM

Note: Please refer to the full policy for both Non-Practicing and Retired membership categories on pages 2 and 3 of this form prior to completing the form.

Please print or type clearly

Last Name

First Name

E-mail

Mailing address

NOTE: Please be sure to indicate above the email address and mailing address you will be using as your primary contact from now on, in your new membership status.

I am requesting or applying for (check one):

Applying for leave from active membership
Requesting to return to previous active status

Current Membership Status:

Requested New Status:

If applying for leave from active membership (please complete all sections below):

Start date

End date

Explanation / Reason for “on leave” status request:

For other reasons, please specify below:

I hereby certify that during the period for which I am a member “on leave” I will not be actively engaged in an any planning work for gain, in any capacity; and acknowledge and agree that should I become engaged in any planning work I will immediately contact the Institute and request to reinstate my active membership status.

Signature of Member

Request Date

CONDITIONS OF OPPI NON-PRACTICING MEMBERSHIP

- Candidate and Full members may select practicing/non-practicing categories during renewal process or submit written request to OPPI outside of the renewal period. These may be subject to clarification from Professional Standards and Registration Committee (PRSC) or a random audit.
- Permitted reasons for Non-Practicing membership may include: medical leave, disability leave, parental leave, or have returned on a fulltime basis to school, accepted an employment position outside of the practice of planning, or any other reason approved by the Registrar.
- If approved to move to a non-practicing category, you will pay a reduced fee for the coming year – see OPPI annual fees chart for current rates.
- Non-Practicing Full members may use the title Registered Professional Planner (Non-Practicing), or RPP (Non-Practicing).
- Time spent as a Non-Practicing Candidate member does not count towards the seven-year deadline for attaining Full member status.
- Non-Practicing Full members may act as a Sponsor or Mentor.
- Non-Practicing members may vote in OPPI affairs such as elections and the annual general meeting.
- Non-Practicing members may not be elected as a Director on OPPI Council.
- Members must submit a request form to move into, and back out of, Non-Practicing membership.
- Non-practicing Candidate/Full membership is intended as a temporary membership category. At the Registrar's review and discretion, a member may be removed from this category if they are deemed to misuse its intended purpose.
- When a member moves to Non-Practicing, the "Extended Reporting Period" (ERP) from their liability insurance policy is activated. Non-Practicing members may renew without purchasing professional liability insurance for the year, providing they had moved to Non-Practicing prior to renewal, and further providing they are not practicing planning in a pro bono capacity.
- If a member moves to Non-Practicing after renewal, no money shall be reimbursed for their insurance policy. If a member returns to practice part way through the year, they must purchase liability insurance (at a pro-rated amount) prior to returning to full practice.
- Non-Practicing members are exempt from Continuous Professional Learning (CPL) requirements for the duration of their time in this membership category, up to five years. Members who remain in Non-Practicing for any amount of time beyond five years will be subjected to the most current CPL requirement(s) of the Institute each year. Under extenuating circumstances, this condition can be waived at the discretion of the Registrar. Where a member returns to practice after more than 5 years without fulfilling their CPL requirements, they may be provided with a "grace period" in order to fulfill the requirements. When changing to/from non-practicing mid-year, members are not refunded or changed the difference in membership fee (between practicing and non-practicing memberships).
- While they are on such leaves, members should meet a "pro-rated" CPL requirement set by OPPI staff (i.e., if they are practicing for half of the year, they should meet half of the normal CPL requirement). However, by submitting a request to the Registrar, pro-rated CPL requirements may be reviewed, and exemptions may be offered on a case-by-case basis.

CONDITIONS OF OPPI RETIRED MEMBERSHIP

- A Retired Member is a Full Member who is not engaged in the activity of planning for gain, who has applied to be placed on the retired list and who has been accepted in writing as retired by the Registrar.
- Retired Members may use the designation RPP (Ret.), and may renew as Retired Member only if they are not earning income from planning, do not plan to earn income from planning and did not earn income from planning previously while in Retired Membership category.
- Retired Members are voting members but are not entitled to be nominated for election as a Director.
- Retired members are exempt from Continuous Professional Learning (CPL) requirements for the duration of their time in this membership category.
- When a member moves to Retired, the “Extended Reporting Period” (ERP) from their liability insurance policy is activated. Retired members may renew without purchasing professional liability insurance for the year, providing they had moved to Retired prior to renewal, and further providing they are not practicing planning in a pro bono capacity.
- If a member moves to Retired after renewal, no money shall be reimbursed for their insurance policy. If a member returns to practice part way through the year, they must purchase liability insurance (at a pro-rated amount) prior to returning to full practice.