

The Academy of Experts

Membership Upgrade Form

Application for Fellowship

-

Expert Witness

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Application Form - Upgrade to Fellow

Please ensure that you have fully read and understood the notes which accompany this form prior to completing your application

1 - Contact Details

Name	Title:	Firstname:	Surname:
Company			
Contact Address			
Tel			
Mobile			
e-mail			
TAE Member No		Date elected as Full Member	

2 - Training

Courses on Expert Work attended during the last three years:

Date(s)	Duration	Course Subject	Training Organisation

3 - Referees

Please provide **four** referees - preferably two of whom are Lawyers who have instructed you and at least one of whom should have seen you give evidence (*see notes*):

1	Name	Title:	Firstname:	Surname:
	Occupation			
	Firm			
	Address	Postal:	DX:	
	Tel			
	e-mail			
2	Name	Title:	Firstname:	Surname:
	Occupation			
	Firm			
	Address	Postal:	DX:	
	Tel			
	e-mail			
3	Name	Title:	Firstname:	Surname:
	Occupation			
	Firm			
	Address	Postal:	DX:	
	Tel			
	e-mail			
4	Name	Title:	Firstname:	Surname:
	Occupation			
	Firm			
	Address	Postal:	DX:	
	Tel			
	e-mail			

4 - Court Appearances

Number of appearances before a Court, Tribunal or Arbitrator as an Expert during the last three years*:

Court or Tribunal	Date & Duration of Trial	Time in Box	Name & Firm of Instructing Solicitor

* If you have not given evidence in the last three years please give details of when, if at all, you have given evidence in court/tribunal

5 - Expert Reports

Expert Reports submitted during the last three years:

Subject Matter	Purpose	Outcome

6 - Meetings of Experts

Details of Meetings of Experts attended during the last three years:

Court/Tribunal/Arbitration	Who drafted the joint statement	Face-to-face/ Online/Telephone	Duration of Meeting	Name & Firm of Instructing Solicitor

7 - Fitness to Practise

Yes- No

Are you aware of any matters which might call into question whether you are a fit and proper person to provide professional services as an expert? -

Are you currently, or have you in the past 10 years, the subject of any Disciplinary or Regulatory enquiries, investigation or proceedings before any professional, trade or membership body or organisation? -

Have any proceedings been brought against you in any court or tribunal or have you been informed that any such proceedings are going to be brought against you? -

Are you aware of any adverse comments given about your performance as an expert? -

Do you have any criminal convictions (other than motoring offences which did not result in disqualification) which are unspent under the terms of the Rehabilitation of Offenders Act 1974 (UK) or similar provision (other jurisdictions)? -

Please answer all questions. If you have answered YES to any of the questions then please provide details on a separate sheet. Tick here if you have enclosed any such information:

8 - Additional Information

Enclosures

Please those you have enclosed

- | | | | |
|--|--------------------------|--|--------------------------|
| A current CV | <input type="checkbox"/> | Details of Publications | <input type="checkbox"/> |
| Two recent Expert Reports (see notes) | <input type="checkbox"/> | Passport sized photograph | <input type="checkbox"/> |
| Two recent Joint Statements (anonymised) | <input type="checkbox"/> | Any other information that may assist the Vetting Committee: | <input type="checkbox"/> |
| Copies of Professional Certificates obtained since Full Membership granted | <input type="checkbox"/> | Payment | <input type="checkbox"/> |

Please Note:

This form and any enclosures may be submitted to TAE in electronic format - please see the notes at the end of the application form for further details.

Any supporting reports and joint statements you send us may be destroyed at the conclusion of the processing of this application.

For Academy use only:

Recommended by:
Application complete:
Vetting Committee:

Reg N^o:
Recommendation:
Accepted by Council:

Payment

The vetting fee for upgrade to Fellow is £180 inc vat and should accompany this application form or be made in advance.

The Academy membership year runs from 1st March - where the upgrade process spans a membership year applicants will continue to be invoiced as a Full Member at renewals.

Successful applicants will be invoiced for the additional membership subscription at the Fellow's rate at the conclusion of the vetting process.

- Payment by:
- enclosed cheque - make cheques payable to 'The Academy of Experts'
 - credit card
 - bank transfer - The Academy of Experts - Sort Code: 40-02-07 - Account: 71246550
 - PayPal - send payment to paypal@academy-experts.org

Credit Card Details

- Amex
- VISA Credit
- Mastercard Credit
- VISA Debit
- Mastercard Debit

Nº:

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Expiry:

MM	YY
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Card Security Nº:

CVV

Cardholder Name:

Registered Card Address:



Questions?

Call 020 7430 0333

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PLEASE DO NOT WRITE ON OR OTHERWISE MARK THIS PAGE

Notes on completion of the 'Application to Upgrade to Fellow'

Please ensure that you have fully read and understood these notes prior to completing your application

Box Comment

1 Telephone numbers given should be those to be used during normal working hours.

2 Training

All courses or CPD events involving Expert work should be stated. If courses are less than a full day they should be stated as $\frac{1}{4}$, $\frac{1}{2}$, or $\frac{3}{4}$ day as applicable. The subject matter of the course should emphasise its relevance to Expert work.

The organisation which provided the course should be given and when the course is organised by the employer of the applicant the letters IH (in-house) should be used.

3 Referees

The names of four persons for whom the applicant has undertaken Expert work should be given. At least two of the referees should be lawyers one of whom must have seen the applicant giving evidence.

The referees must include the persons for whom the reports submitted with the application (see *Enclosures*) were provided.

4 Court Appearances

Each court or tribunal appearance where Expert evidence was given should be listed. The approximate overall duration of the trial and the period during which the applicant was in the box should be stated for each appearance. If you have not given evidence in the last three years please give

details of when, if at all, you have given evidence in a court or tribunal.

Please note that if you have no recent court experience (ie within the last three years) then the committee may require you to participate in a simulated appearance.

5 Expert Reports

For each Expert report produced by the applicant in the last three years the subject matter of the report, the purpose for which it was required (eg. investigating a failure, an expert determination, evidence in an action) and the outcome following its submission (ie. dispute settled, report accepted and acted upon, proceeded to trial) should be stated.

6 Meetings of Experts

Details should be supplied relating to the Meeting of Experts that the applicant has participated in. This should include whether or not a Joint Statement was prepared and the nature of the meeting.

Applicants are encouraged to submit two Joint Statements (JS) which they have drafted. These will be treated in strict confidence by all those involved in the vetting process. The JS should not be relevant to any active dispute. The JS can be suitably anonymised or redacted.

Call 020 7430 0333 if you have any queries

Application Form - Upgrade to Fellow

Enclosures

Expert Reports: The application should be supported by two typical Expert reports that the applicant has recently produced. These will be treated in strict confidence by all involved in the vetting process and may be suitably anonymised or redacted. The reports should not be relevant to any active dispute. The reports can be supplied in electronic format (if not then please provide duplicate copies) and may be destroyed upon completion of the vetting procedure. You should give as one of your referees the person for whom each enclosed report was prepared.

The reports should preferably be ones that have been produced in evidence in an action.

CV: The CV should stress the aspects of the applicant's work in addition to the Expert work. It should be confined to factual material.

Joint Statement: see notes for Meetings of Experts.

Additional Requirements

The Vetting Committee in addition to assessing the reports and consulting the references will require to be satisfied as to:

- i) The standing of the applicant within his trade or calling.
- ii) The integrity of the applicant.
- iii) The ability of the applicant to express his views concisely and clearly both orally and in writing.
- iv) The understanding that the applicant has of his duties in relation to the court and to the client.
- v) Knowledge of legal procedures.

Any information which the applicant considers would be helpful to the Committee with regard to any of these matters may be submitted with the application and should be listed on the application form.

Assessment Procedure

1. The time taken for the assessment is generally about 6 months.

Your application will be acknowledged. Thereafter you will not be advised of its progress unless there are matters which require action. Telephone enquiries are likely to extend the period required as they usually disrupt the sequence of the assessment.

2. Failure to complete the application as required may invalidate or delay the application.
3. Applicants are advised to warn their referees that a request will be coming from the Academy, and ask them to respond promptly. Applications will not be assessed until the references have been received.

4. Interview

As part of the process all applicants will be interviewed by the Committee.

Interview times are not arranged until the assessor has made a report and it has been considered by the Committee.

Applicants should note that interviews are usually held in Central London and last for around 45 minutes.

Data Protection

Your information will be held by The Academy which is the data controller and will be processed by our partner organisation ARA Conference Services (ARACS) on our behalf. We will use your personal information to administer your membership and provide services and information to you in that connection. As part of the application process, we will pass your information to our assessors who will consider your application on our behalf. For more information on how we use your personal information, please see our Privacy Notice (available from our website or the office).

The Academy of Experts' Code of Practice

Preamble

This Code of Practice shows minimum standards of practice that should be maintained by all Experts.

It is recognised that there are different systems of law and many jurisdictions in Europe, any of which may impose additional duties and responsibilities which must be complied with by the Expert.

There are in addition to the Code of Practice, General Professional Principles with which an Expert should comply.

These include the Expert:

- Being a "fit and proper" person
- Having and maintaining a high standard of technical knowledge and practical experience in their professional field
- Keeping their knowledge up to date both in their expertise and as Experts and undertaking appropriate continuing professional developments and training.

The Code

1. Experts shall not do anything in the course of practising as an Expert, in any manner which compromises or impairs or is likely to compromise or impair any of the following:
 - a) the Expert's independence, impartiality, objectivity and integrity,
 - b) the Expert's duty to the Court or Tribunal,
 - c) the good repute of the Expert or of Experts generally,
 - d) the Expert's proper standard of work,
 - e) the Expert's duty to maintain confidentiality.
2. An Expert who is retained or employed in any contentious proceeding shall not enter into any arrangement which could compromise his impartiality nor make his fee dependent on the outcome of the case nor should he accept any benefits other than his fee and expenses.
3. An Expert should not accept instructions in any matter where there is an actual or potential conflict of interests. Notwithstanding this rule, if full disclosure is made to the judge or to those appointing him, the Expert may in appropriate cases accept instructions when those concerned specifically acknowledge the disclosure. Should an actual or potential conflict occur after instructions have been accepted, the Expert shall immediately notify all concerned and in appropriate cases resign his appointment.
4. An Expert shall for the protection of his client maintain with a reputable insurer proper insurance for an adequate indemnity (currently £1m).
5. Experts shall not publicise their practices in any manner which may reasonably be regarded as being in bad taste. Publicity must not be inaccurate or misleading in any way.
6. An Expert shall comply with all appropriate Codes of Practice and Guidelines.

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