

# Case study form

## ***Licensed member***



Thank you for agreeing to share your story with us. Our case studies are at the heart of our brand and communications. Case studies allow us to show real-life examples of how we fulfil the needs of our students, members and businesses, and help them reach their goals..

### Where do we use our case studies?

By agreeing to become an AAT case study, you're also committing to assist us in our communications. We may also approach you with the opportunity to participate in a photo shoot. Please note that participation is voluntary. If you decide not to participate there will not be any negative consequences on your future dealings with AAT. If you decide to participate, you may stop participating at any time and you may decide not to answer any specific question.

**Before AAT can process your case study form, you'll need to consent to points 1-7 on the last page. Without full consent we will be unable to use your details.**

Please make sure you're happy with these statements before continuing. Upon submitting this form to us, we'll keep your details for up to five years. For details about how AAT process your data, please refer to AAT's [Privacy policy](#).

First name

Surname

Membership number

Ethnicity *(optional)*

Place of work

Job title

Email

Telephone number

Social media handle

Date of birth *(optional)*

City

Country

### What sector do you operate in?

Private

Public *(such as health care, emergency services, schools)*

Practice *(large)*

Practice *(medium)*

Practice *(small)*

Government and local authority

Voluntary

Charity or No-for-profit

Do you have a physical or mental health condition or illnesses lasting or expected to last 12 months or more? *(optional)*

Yes

No

If Yes, does your condition or illnesses reduce your ability to carry out day to day activities? *(optional)*

Yes, a little

Yes, a lot

No

Your relationship with AAT *(please tick all applicable boxes below)*

AATQB

MAAT

FMAAT

AAT Licensed Bookkeeper

AAT Licensed Accountant

Are you a member of another professional body other than AAT?

Yes

No

If yes, which professional body?

### What industry do you operate in?

Accounting, banking and finance

Business, consulting and management

Engineering and manufacturing

Education

Healthcare

IT

Leisure, sport and tourism

Media

Retail

Other

Signature

Date form completed

Which AAT qualification did you study?

Why did you decide to study this AAT qualification and how old were you?

What did you do before you began studying with AAT?

What inspired you to start your own business and become an AAT licensed member?

From your experience, what are the advantages associated with being an AAT licensed member?

Tell us a little more about your business.

How many staff do you employ?

How many clients do you have?

Which industries do you typically work with?

What are the benefits of becoming your own boss?

What have been some of the challenges you have overcome?

Do you have any interests outside of work that may make for an exciting case study story?

**Before AAT can process your case study form, you'll need to consent to the first seven points (1-7).  
Without full consent to these six points, we will be unable to use your details.**

- |   |     |    |
|---|-----|----|
| 1. I consent to AAT processing all of my sensitive personal data, including health-related details and ethnic background where provided or captured as part of photography or video or as part of this form.  | Yes | No |
| 2. I consent to AAT sharing my name, contact details, membership status, employment status, employer, pre-approved quotes and photography with third parties that work under contract on behalf of AAT. These include creative and digital agencies in the UK, EEA and non-EEA countries.   | Yes | No |
| 3. I consent to AAT publishing my name, membership status, employment status, employer, pre-approved quotes and photography on the AAT website, AAT's blog, AAT's magazines, AAT's offices and internal communications, membership and events materials, marketing and paid for advertising in the UK, EEA and non-EEA countries.   | Yes | No |
| 4. I consent to AAT and carefully selected third party media representatives that work under contract on-behalf of AAT (e.g. AAT magazine journalists, photographers etc.) contacting me to take part in interviews relating to my journey with AAT. Media representatives may be from both EEA and non-EEA countries for national, regional, trade and consumer publications and/or broadcast.   | Yes | No |
| 5. I consent to AAT sharing my name, contact details, membership status, employment status, employer, pre-approved quotes and photography with independent third-party media representatives (e.g. journalists), who may contact me to take part in interviews relating to my journey with AAT. Please note, our media team will only engage with journalists once approval directly from yourself is obtained that you are happy for us to share this information and photography. Media representatives may be from both EEA and non-EEA countries for national, regional, trade and consumer publications. | Yes | No |
| 6. I consent to AAT sharing my name, membership status, employment status, employer, pre-approved quotes and photography on AAT's Facebook, Instagram, Threads, WhatsApp, LinkedIn, TikTok, X, YouTube and Vimeo. Social media platforms store data in both EEA and non-EEA countries.  | Yes | No |
| 7. I consent to AAT using my name, membership status, employment status, employer, pre-approved quotes and photography for online paid advertising and boosted posts on AAT's Facebook, Instagram, Threads, WhatsApp, LinkedIn, TikTok, X, YouTube and Vimeo. Social media platforms store data in both EEA and non-EEA countries.  | Yes | No |
| 8. I consent to AAT contacting me with media opportunities relating to my journey with AAT. Media opportunities may be from both EEA and non-EEA countries for national, regional, trade and consumer publications and/or broadcast.  | Yes | No |

# Thank you

Please email your completed form  
to [casestudies@aat.org.uk](mailto:casestudies@aat.org.uk)

AAT is a registered charity. No. 1050724

Our case studies are passionate about AAT and want to be involved in our communications because they have a story they want to share. We don't pay case studies as this wouldn't be an honest representation of our brand. We'll pay incurred expenses when you're participating in any case study activity and this payment will be formally agreed beforehand.

Name

Membership number

Date form completed

Signature