

# Application for ICAEW Business and Finance Professional



Please complete all boxes in full and return this form by email to [applications@icaew.com](mailto:applications@icaew.com)

YOUR DETAILS		
Mr, Mrs, Miss, Ms or other title	Date of Birth	
Forename/given name		
Surname/family name		
Student registration number		
Primary address		
Postcode/zipcode	Country	
Secondary address		
Postcode/zipcode	Country	
Telephone	Mobile	
Email		
If any of your contact details are different to those we have on file should we update your record?	YES	NO

## IMPORTANT CHECKLIST: before you submit your application, have you:

Been awarded the ICAEW CFAB qualification or if you are a past or current ACA student who is eligible for the ICAEW CFAB certificate please write in to [applications@icaew.com](mailto:applications@icaew.com) in order to obtain this award.

Reached the required standard in the Ethics Learning Programme online assessment Score %

Completed the work experience requirements in full within the last three years

Have confirmed that you have demonstrated all of the steps within the professional skills development requirements to your sponsor

Obtained confirmation from an eligible sponsor that you have successfully completed the work experience and professional skills development requirements in full

If you have not met all of the above conditions your application will not be accepted.

## WORK EXPERIENCE AND PROFESSIONAL SKILLS DEVELOPMENT

You must have completed 12 months' full-time work experience in a business and/or finance role (or the pro-rata equivalent if working part time) within the three years before the date of this application and have demonstrated the required professional skills detailed in sections 1 to 7 below to your sponsor. Please complete the following information about your work experience.

Start date of work experience period  
(NB: this must be no more than three years before the date of this application)

End date of work experience period

Duration of work experience period (NB: This must be 12 months or the pro-rata equivalent if working part time or if you have had any consecutive breaks in excess of four weeks' duration)

Employer throughout this period of work experience

Address of employer throughout this period

Telephone number of employer throughout this period

Your job title throughout this period

Hours worked per week throughout this period

Dates that you worked for this employer eg, 1/1/2000 to present

Please note that ICAEW reserves the right to make enquiries regarding the information you have provided

## 1. ETHICS AND PROFESSIONALISM

The ability to behave ethically and sustainably while respecting others in order to uphold the values of the organisation and the accountancy profession.

<b>Skill</b>	<b>I have demonstrated</b>	<b>Tick</b>
valuing diversity	I value different perspectives, respect individual differences and support fair treatment and equal opportunities for all.	
observing confidentiality	I respect and maintain confidentiality in my dealings with others. I act with sensitivity in situations when maintaining confidentiality would be in breach of the public or organisational interest.	
demonstrating integrity	I behave truthfully, honestly, and in the public interest. I take responsibility for my own actions and my own development.	

## 2. COMMUNICATION

The ability to communicate effectively at all levels, using oral, written and presentational skills, in order to achieve positive outcomes.

Skill	I have demonstrated	Tick
influencing	I adapt my behaviour, style, approach and means of communication towards another person to gain their commitment or agreement to a course of action. I can persuade another person to change their point of view, asserting my own position, while showing an understanding of theirs.	
communicating in writing	I produce emails, letters or reports that are clear, logical and well-structured and meet the needs of my intended audience.	
listening effectively	I pay attention to what other people are saying and show attentive body language. I keep an open mind when listening to others' perspectives and show empathy.	

## 3. TEAMWORK

The ability to work collaboratively as a member or leader of a team in order to achieve shared goals.

Skill	I have demonstrated	Tick
delivering tasks under pressure	I monitor and manage workload and resources to contribute to team objectives. I stay calm under pressure.	
valuing diverse perspectives	I am open-minded to input, feedback and suggestions from different people, including those whose views are different from mine.	
collaborating with others	I motivate others by recognising individual team members' achievements. I encourage and promote teamwork to achieve shared goals. I share knowledge and insight to achieve team goals.	
asking for help	I know when to ask for help and where to find it. I use opportunities to learn from others.	

## 4. DECISION MAKING

The ability to gather, interpret and evaluate data in order to make effective decisions.

Skill	I have demonstrated	Tick
applying professional scepticism	I use a questioning mind to identify when information is biased, arguments are flawed, contradictions exist between different pieces of information, or assumptions are not justified.	
drawing conclusions	I draw conclusions based on relevant data.	
organising data	I use appropriate tools, such as spreadsheets, databases, or data analytics, to organise data to make it understandable.	
gathering relevant data	I clarify needs from others and gather appropriate data to help them make a decision. I understand the context in which decisions are being made.	

## 5. PROBLEM SOLVING

The ability to analyse a problem, generate options and make recommendations in order to arrive at appropriate solutions.

Skill	I have demonstrated	Tick
prioritising	I use my initiative to evaluate and prioritise what is important, focussing on key issues and outputs.	
evaluating different options	I use analytical techniques to evaluate options and rank potential solutions, identifying associated risk and uncertainty. I show adaptability in the face of change.	
identifying problems	I define a problem by asking questions to clarify the nature of the problem and the business impact. I gather information to enable me to analyse the problem.	
supporting others to solve problems	I share my knowledge and experience with others to help them when solving problems. I learn through practical experience of a problem.	

## 6. ADDING VALUE

The ability to add value to the organisation, team or role in order to achieve objectives.

Skill	I have demonstrated	Tick
continued learning	I reflect on my own performance and identify ways in which I could improve. I develop specific skills or knowledge that enable me to add value to my organisation, team or role.	
exceeding expectations	I use my initiative to achieve something more than is expected. I am open-minded and adaptable in finding new or better ways of doing things that adds value to my organisation, team or role.	
showing resilience	I overcome obstacles and setbacks and continue to perform effectively when faced with pressure or adversity.	
working flexibly	I respond flexibly to changing circumstances without losing my efficiency and focus, using my initiative to get the job done and complete multiple tasks on time.	

## 7. TECHNICAL COMPETENCE

The ability to seek, learn and use technology and technical information in order to support the achievement of organisation or team goals.

Skill	I have demonstrated	Tick
identifying technical issues	I identify technical issues in work assignments and use my technical knowledge and skills to resolve them.	
using technology appropriately	I employ appropriate technological solutions to work situations, such as using a relevant office software package, data analytics application, or accounting programme.	

## YOUR DECLARATION

At the point of registration/application with ICAEW, you are required to declare any past act or default that might be perceived as bringing discredit on yourself, ICAEW or the profession of accountancy, however long ago the act or default occurred and wherever it took place. Acts or defaults occurring after registration with ICAEW should be declared to ICAEW as soon as is practicably possible. If you are found to have failed to disclose relevant information, your registration application may be revoked or BFP status prevented or withdrawn. In addition, disciplinary action may be taken against you.

The designation BFP is not exempt from the Rehabilitation of Offenders Act 1974. We only ask applicants to disclose convictions which are not yet spent under the Rehabilitation of Offenders Act 1974, as amended in 2014.

Acts requiring disclosure would include (but are not limited to):

- being found guilty of (or having pleaded guilty to) any criminal offences;
- having been charged with a criminal offence which is as yet to come to trial;
- entering into an Individual Voluntary Arrangement or similar composition with creditors;
- failing to satisfy a judgement debt;
- being the subject of an adverse finding by a professional body or regulator;
- having had a disqualification order made, or having given a disqualification undertaking, under the Company Directors Disqualification Act 1986, or similar overseas legislation; or
- having entered into bankruptcy or being a discharged bankrupt.

Do you have any unspent convictions, cautions, reprimands or final warnings?                      YES                      NO

If any of the acts or defaults listed above do apply to you, or you think that there are similar matters which you should declare, please answer YES to the question above and include details on a separate sheet with this application. Some of the matters listed are UK specific, but you should always declare any equivalent act or default which occurred outside the UK.

Please note that if you make a disclosure, this will not automatically result in your registration being refused. ICAEW may, however, wish to make further enquiries before reaching a decision.

I consent to my criminal conviction data being checked for entrance criteria.

Signature

Date

## STUDENT CHECKLIST

### I can confirm that the above details are correct

Should my application be successful I understand that

I will be bound by ICAEW's Foundation Qualification regulations and the Code of Ethics and disciplinary bye-laws.  
For more information on the regulations visit [icaew.com/becomeabfp](http://icaew.com/becomeabfp)

My status as an ICAEW Business and Finance Professional does not constitute membership of ICAEW and means that I am not an ICAEW Chartered Accountant and if I hold myself out to be either it could result in disciplinary action, a fine, and/or de-registration as an ICAEW Business and Finance Professional

As an ICAEW Business and Finance Professional I may not engage in public practice unless I am an ICAEW member and eligible to engage in public practice under the Practising Certificate Regulations

Signature  
of student

Date

## REGISTRATION AND SUBSCRIPTION FEES

You will pay a one-off registration fee and your first year's annual subscription once your application has been approved.

All subscriptions are renewable on 1 January each year. **Your first renewal will be on 1 January 2020.**

**PLEASE DO NOT SEND PAYMENT NOW. Once we have validated your application we will send payment instructions. We accept payment by direct debit from a UK bank account, Western Union Business Solutions, a GBP credit or debit card, or by cheque.**

REGISTRATION DATE	REGISTRATION FEE	ANNUAL SUBSCRIPTION FEE	TOTAL
1 January 2019 to 30 June 2019	£25	£125	£150
1 July 2019 to 31 December 2019	£25	£62.50	£87.50

**A concessionary annual subscription of £50 per year (£25 for applications between 1 July 2019 and 31 December 2019) is available if your annual income is below £28,600. If your annual income is below £28,600 please see the rates table below to see how much you will need to pay.**

Rates table for concessionary rate applicants only.

REGISTRATION DATE	REGISTRATION FEE	ANNUAL SUBSCRIPTION FEE	TOTAL
1 January 2019 to 30 June 2019	£25	£50	£75
1 July 2019 to 31 December 2019	£25	£25	£50

### USING YOUR PERSONAL INFORMATION

The protection of personal privacy is an important concern to ICAEW. Any personal data collected will be treated in accordance with current data protection legislation. We will use your personal data to deliver your inclusive student services including; advice, awareness, assessment, CABA eligibility, communication, examinations, networking, products, quality, regulation, research, services, training and to administer your membership account. Any documents submitted as part of your registration may be checked with the issuing authority to ensure their authenticity. In order to meet our student obligations to you we may share relevant personal data with communities, faculties, local groups, district & student societies, your employer, Regulatory bodies and with external assessment, training and examination partners.

For more information about our data protection policy please go to [icaew.com/dataprotection](https://www.icaew.com/dataprotection) \* Version 2018/03

## APPROVING SPONSOR

By signing this form I confirm that

- I am a current member in good standing of an IFAC member body and I am compliant with their CPD regulations
- I have included a copy of my membership certificate with this application and agree to provide a letter of good standing on request
- The applicant has completed 12 months' full-time work experience in a business and/or finance role (or the pro-rata equivalent if working part time) within the three years before this application date

from \_\_\_\_\_ to \_\_\_\_\_

- I worked at the same organisation as the applicant for the whole duration of the work experience period included in this application
- The applicant has demonstrated all of the skills in sections 1 to 7 of the professional skills development section above
- I agree to act as a sponsor for this applicant to become recognised as an ICAEW Business and Finance Professional and be awarded the designatory letters BFP
- I understand that ICAEW reserves the right to make enquiries to establish my suitability to approve the work experience and professional skills development for this applicant

Name \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

Membership body name \_\_\_\_\_

Membership number \_\_\_\_\_

Your job title throughout the applicant's work experience period \_\_\_\_\_

Please explain how you worked with the applicant throughout their work experience period  
(eg, I was their line manager)

Employer name throughout this period \_\_\_\_\_

Address of employer throughout this period \_\_\_\_\_

Telephone number of employer throughout this period \_\_\_\_\_

Dates that you worked for this employer (eg, 1/1/2000 to present ) \_\_\_\_\_

Please note that ICAEW reserves the right to make enquiries regarding the information you have provided

### USING YOUR PERSONAL INFORMATION

The protection of personal privacy is an important concern to ICAEW. Any personal data collected will be treated in accordance with current data protection legislation. We will use your personal data to ensure compliance with the requirements of the qualification you are sponsoring this applicant for. In order to meet our obligations to the applicant we may share your personal data with Regulatory bodies & with the issuing authority of any supporting documentation, for example a letter of good standing.

For more information about our data protection policy please go to [icaew.com/dataprotection](https://www.icaew.com/dataprotection) \*Version 2018/05