

HONG KONG INSTITUTE OF CERTIFIED PUBLIC ACCOUNTANTS (“HKICPA”/“the Institute”)
Prospective Member's Record of Practical Experience for Membership Admission
Employment Summary of Prospective Member

Name of Prospective Member (Note 6) : _____
 (in BLOCK letters)

Student Registration No.: _____

Practical Experience: (in chronological order with current employment in the last row) **No. of years required (tick one only) (Note 1) :**
 3 years 4 years 5 years

Part A

	Employer(s)*	Practical experience component achieved	Training Year					
			Year 1	Year 2	Year 3	Year 4	Year 5	Total
			No. of working days acquired (Notes 2 & 3)					
1	_____	<input type="checkbox"/> ** Basic						
	to _____	Principal						
			Period: (dd/mm/yyyy)					
2	_____	<input type="checkbox"/> ** Basic						
	to _____	Principal						
			Period: (dd/mm/yyyy)					
3	_____	<input type="checkbox"/> ** Basic						
	to _____	Principal						
			Period: (dd/mm/yyyy)					
Total								

Practical Experience Components***	No. of working days acquired (Notes 2 & 3)		
	Basic	Principal	Total
Fundamentals of accounting		--	
Financial accounting and external reporting			
Auditing and internal auditing			
Financial management			
Taxation			
Management accounting	--		
Information management and technology	--		
Insolvency	--		
Other competencies	--		
Total:			

Signature of Prospective Member: _____ Date: _____

* Please use a separate sheet if necessary.
 ** Please tick “✓” if the employer is an Authorized Employer registered with HKICPA.
 *** Not less than 100 working days should be acquired for a component.

HONG KONG INSTITUTE OF CERTIFIED PUBLIC ACCOUNTANTS ("HKICPA"/"the Institute")**Prospective Member's Record of Practical Experience
for Membership Admission***(Complete this sheet for each employer if more than one employer)*

Name of Prospective Member: _____ Student Registration No.: _____

Duration of employment : From

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 / To

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(dd/mm/yyyy) (dd/mm/yyyy)

Employer: _____

Work Location: _____ Position Held: _____

To be completed by the representative of the Employer of the prospective memberName of Representative: _____ Signature & Company Chop: _____
Title: _____ Date: _____**To be completed by the Authorized Supervisor or a Counselor of the Authorized Employer during the employment of the prospective member with the above employing organization. (Note 5)****If there is/was a change of Authorized Supervisor or Counselor during the employment of the prospective member, each of them should fill in his/her own details.**

I confirm that the above-named person was under my supervision for the period as stated;

In my opinion, the above-named person:

- has acquired his/her practical experience by achieving the required competency units of the relevant Basic and/or Principal Practical Experience components as recorded; and
- has achieved a reasonable level of skills in each of the Generic Competencies as recorded.

I declare that, to the best of my knowledge and belief, the information provided in the following pages is true and correct as at this date.

Name of Authorized Supervisor/Counselor: #
(Full Name in BLOCK LETTER) _____

Signature: _____

Initial
(as the same that signing in the Training Record) _____

Title: _____

HKICPA member Membership No.: _____

Date: _____

Period of Supervision:
(mmm/yy to mmm/yy) _____

Please delete as appropriate.

To be completed by the Authorized Supervisor or a Counselor of the Authorized Employer during the employment of the prospective member with the above employing organization. (Note 5)**If there is/was a change of Authorized Supervisor or Counselor during the employment of the prospective member, each of them should fill in his/her own details.**

I confirm that the above-named person was under my supervision for the period as stated;

In my opinion, the above-named person:

- has acquired his/her practical experience by achieving the required competency units of the relevant Basic and/or Principal Practical Experience components as recorded; and
- has achieved a reasonable level of skills in each of the Generic Competencies as recorded.

I declare that, to the best of my knowledge and belief, the information provided in the following pages is true and correct as at this date.

Name of Authorized Supervisor/Counselor: #
(Full Name in BLOCK LETTER) _____

Signature: _____

Initial
(as the same that signing in the Training Record) _____

Title: _____

HKICPA member Membership No.: _____

Date: _____

Period of Supervision:
(mmm/yy to mmm/yy) _____

Please delete as appropriate.

Note 1 – Length of Practical Experience

To apply for HKICPA membership, the applicant must satisfy the following “practical experience” requirements:

- 1.1 The length of practical experience required for:
- Approved degree holders or HKIAAT graduates who have passed the QP a minimum of 600 working days acquired within three years
 - Approved accountancy diploma holders a minimum of 800 working days acquired within four years
 - Holders of other academic qualifications a minimum of 1,000 working days acquired within five years
- 1.2 Within the required length of full-time practical experience for membership, an applicant can have up to two employments, each of which is less than 12 months long with the same employer. The rest of the experience must be acquired from employment(s) that lasts for at least 12 months with the same employer. Depending on the academic qualifications of the applicant, the respective requirements are:

	Minimum length of full-time practical experience for membership	Maximum number of employments	Maximum number of employments which are less than 12 months each
Approved degree holders or HKIAAT graduates who have passed the QP	3 years	4	2
Approved accountancy diploma holders	4 years	5	2
Holders of other academic qualifications	5 years	6	2

- 1.3 “Part-time” experience will not be counted as part of the practical experience.

Note 2 – Total Working Days’ Experience Requirement

- 2.1 The Total Working Days’ Experience Requirement is to be a **minimum of 150 working days per annum** during the normal period of practical experience required by law, i.e. three to five years, and a minimum of 600 working days acquired in a period of not less than 3 years. All prospective members will need to complete a minimum of 600, 800 or 1,000 working days’ experience to mirror the three, four or five years requirement as the case may be. Such experience must be acquired within 10 years after their registration as a student of the Institute.
- 2.2 A “working day” is defined as a minimum of seven working hours per day. Overtime hours will be counted as part of the practical experience for membership purposes based on a 7-working-hour-equivalent concept. In other words, any working day which is less than 7 hours can be accumulated. The number of days is then calculated by dividing the total accumulated hours by 7 hours.

Note 3 – Practical Experience Components

- 3.1 In addition to satisfying the required length of practical experience, all practical experience acquired will be divided into two categories: **BASIC** experience components (five components) and **PRINCIPAL** experience components (seven components).
- 3.2 A “practical experience component” comprises 100 working days’ experience. Each component is made up of a number of technical competency units. Applicants will have to demonstrate that they have gained the relevant technical competencies **at the required level of achievement** (see 3.6) to the satisfaction of the person who supervises them. Relevant in-house training may be counted for this purpose.
- 3.3 The basic experience requirement of all accountants is to obtain a grounding in the fundamentals of accounting. Therefore, all successful membership applicants **MUST** have completed **at least 100 working days’ practical experience in the Basic experience component, Fundamentals of Accounting**, including **three out of the four competency units** listed.
- 3.4 For the other Basic and Principal experience components, applicants should record those components in which they have acquired **a minimum of 100 working days’ experience** against the relevant technical competency units of that component. **At least 3 competency units in any Principal component or in a combination of Principal components** must be achieved by the applicant.
- 3.5 Applicants will have to achieve **at least 300 working days’ experience in each of the Basic and Principal categories**. It is highly unlikely but acceptable for applicants to submit experience for work solely related to the Principal category.

- 3.6 The competencies are assigned with levels of achievement. Definitions of levels are appended as below:
S = Supervised level means competent performance under supervision or guidance of an experienced senior
I = Independent level means competent performance working independently of direct supervision
L = Leader level means competent performance as a supervisor, manager, team leader or instructor/trainer

Note 4 – Generic Competencies

- 4.1 There is a requirement to cover all the Generic Competencies specified.
- 4.2 Prospective membership applicants should achieve a reasonable level of skills in each of the Generic Competencies.

Note 5 – Guidance to the Employer and Counselor/Supervisor of Prospective Member

- 5.1 Employers are strongly encouraged to register with the Institute as an **Authorized Employer** so as to provide a satisfactory level of organized supervision and training to the prospective member as a matter of mutual benefit. They are advised to refer to Section 1.6 of the **Practical Experience Framework Support Manual** for more details on the Criteria and Registration Procedures for an Authorized Employer.
- 5.2 The employer should assign **a member of the Institute or a recognized professional accountancy institute** as Counselor, to be responsible for the overall supervision of prospective members under their employ.
- 5.3 In the absence of an Authorized Employer, the prospective member may train under an **“Authorized Supervisor”** who should be an HKICPA Member. Please also see Section 1.6 of the Practical Experience Framework Support Manual for details.
- 5.4 Prospective members will need to demonstrate to their Counselor/Authorized Supervisor that they have acquired the required competencies. It will be the responsibility of the supervisors to assess whether the individual has attained the appropriate practical experience components.
- 5.5 Counselors and Authorized Supervisors are also urged to sign off on this Record Form annually while performance and views on whether appropriate competencies have been achieved are still fresh in mind.

Note 6 – Guidance to Prospective Members

- 6.1 Prospective members are advised to complete this Record Form and obtain their Counselor/Authorized Supervisor's signature annually and whenever there is a change in their immediate supervisor, department, specific job nature, change in employment, etc. as part of the performance evaluation.
- 6.2 Prospective members may make extra copies of this Record Form for regular recording purposes. A set of the Record Form is also available for downloading at the Institute's website at www.hkicpa.org.hk.
- 6.3 Prospective members should only complete the record sheet of those relevant components attained during the period(s) of assessment.

Note 7 – Other Competencies

- 7.1 For working experience acquired from competency units other than those specified in the Basic and Principal Experience Components, prospective members may enter such achievement in the “Other competencies achieved” section under the corresponding component. The Institute will assess such experience on a case by case basis and/or individual merit.

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Part B**BASIC PRACTICAL EXPERIENCE COMPONENTS***(Please use one sheet for each employment if more than one employer)*

Name of Prospective Member: _____

Name of Organization: _____

Name of Counselor/Authorized Supervisor: _____

Competency required	Minimum level attained (Note 3.6)	Training Year				
		Year 1	Year 2	Year 3	Year 4	Year 5
		Please ✓ if achieved				
<u>Fundamentals of accounting</u> * Unit 1 Able to identify and apply relevant accounting standards and pronouncements to a given task or situation relating to the preparation, presentation and reporting of information, both past and projected Examples <ul style="list-style-type: none"> • Maintain awareness of all accounting standards and pronouncements • Identify standards and pronouncements relevant to the individual task • Apply relevant standards and pronouncements appropriately to the task 	Independent					
Unit 2 Able to prepare or analyze the annual reports of a company or other substantial organizations, including determination of accounting policies, appropriate selection and verification of input data, presentation and compliance, within required time frames Examples <ul style="list-style-type: none"> • Determine the accounting policies of the organization • Evaluate information systems required to provide required input data for reliability, timeliness and completeness • Select appropriate data and prepare reports in required format • Arrange dissemination of reports in accordance with requirements and policies 	Supervised					
Unit 3 Able to evaluate accounting and information systems Examples <ul style="list-style-type: none"> • Review and analyze specifications of information systems • Review operation of information systems and evaluate reliability of outputs • Understand source and methods of acquiring necessary inputs • Maintain ability to operate information systems effectively and to evaluate specific outputs required 	Independent					

* 3 out of 4 units have to be attained.

No. of sheets	of
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BASIC PRACTICAL EXPERIENCE COMPONENTS

(Please use one sheet for each employment if more than one employer)

Name of Prospective Member: _____

Name of Organization: _____

Name of Counselor/Authorized Supervisor: _____

Competency required	Minimum level attained (Note 3.6)	Training Year				
		Year 1	Year 2	Year 3	Year 4	Year 5
Please ✓ if achieved						
Fundamentals of accounting * (Continued) Unit 4 Ability to analyze and explain variances between budgeted and actual financial results, including appropriate use of non-financial indicators Examples <ul style="list-style-type: none"> • Understand basis for preparation of projected results • Verify actual results and compare with projected results to identify variances • Analyze individual factors responsible for each significant variance, including non-financial influences, and reconcile both sets of results • Report and explain findings in a form appropriate to the organization concerned 	Independent					
Additional remarks, if any:						

* 3 out of 4 units have to be attained.

No. of sheets	of
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Training Year	Year 1	Year 2	Year 3	Year 4	Year 5
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No. of working days attained for this Component:					
Counselor/Authorized Supervisor's Initial [#] :					

No. of working days attained for this Component:					
Counselor/Authorized Supervisor's Initial [#] :					

If there is/was a change of Authorized Supervisor or Counselor during the employment of the prospective member, each of them should initial against the no. of working days attained for this component under his/her supervision.

BASIC PRACTICAL EXPERIENCE COMPONENTS
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(Please use one sheet for each employment if more than one employer)

Name of Prospective Member: _____

Name of Organization: _____

Name of Counselor/Authorized Supervisor: _____

Competency required	Minimum level attained (Note 3.6)	Training Year				
		Year 1	Year 2	Year 3	Year 4	Year 5
		Please ✓ if achieved				
<u>Financial accounting and external reporting</u>						
Unit 1 Able to apply accounting standards Examples <ul style="list-style-type: none"> • Maintain awareness of all accounting standards and pronouncements • Identify standards and pronouncements relevant to the individual task • Apply relevant standards and pronouncements appropriately to the task 	Independent					
Unit 2 Able to prepare annual reports or financial statements Examples <ul style="list-style-type: none"> • Determine the external reporting policies of the organization • Evaluate information systems required to provide required input data for reliability, timeliness and completeness • Select appropriate data and prepare reports in required format • Arrange dissemination of reports in accordance with requirements and policies 	Supervised					
Unit 3 Able to evaluate accounting and information systems Examples <ul style="list-style-type: none"> • Review and analyze specifications of information systems • Review operation of information system and evaluate reliability of outputs • Understand source and methods of acquiring necessary inputs • Maintain ability to operate information system effectively and to evaluate specific outputs required 	Independent					

No. of sheets	of
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BASIC PRACTICAL EXPERIENCE COMPONENTS

(Please use one sheet for each employment if more than one employer)

Name of Prospective Member: _____

Name of Organization: _____

Name of Counselor/Authorized Supervisor: _____

Competency required	Minimum level attained (Note 3.6)	Training Year				
		Year 1	Year 2	Year 3	Year 4	Year 5
		Please ✓ if achieved				
Financial accounting and external reporting <i>(Continued)</i> Unit 4 Able to explain result variances Examples <ul style="list-style-type: none"> • Understand basis for preparation of projected results • Verify actual results and compare with projected results to identify variances • Analyze individual factors responsible for each significant variances, including non-financial influences and reconcile both sets of results • Report and explain findings in a form appropriate to the organization concerned 	Independent					
Other competencies achieved (please specify):						

No. of sheets _____ of _____

Training Year	Year 1	Year 2	Year 3	Year 4	Year 5
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No. of working days attained for this Component:					
Counselor/Authorized Supervisor's Initial [#] :					

No. of working days attained for this Component:					
Counselor/Authorized Supervisor's Initial [#] :					

If there is/was a change of Authorized Supervisor or Counselor during the employment of the prospective member, each of them should initial against the no. of working days attained for this component under his/her supervision.

BASIC PRACTICAL EXPERIENCE COMPONENTS

(Please use one sheet for each employment if more than one employer)

Name of Prospective Member: _____

Name of Organization: _____

Name of Counselor/Authorized Supervisor: _____

Competency required	Minimum level attained <i>(Note 3.6)</i>	Training Year				
		Year 1	Year 2	Year 3	Year 4	Year 5
		Please ✓ if achieved				
<u>Auditing and internal auditing</u>						
Unit 1 Able to implement audit procedures Examples <ul style="list-style-type: none"> Establish scope, objective and terms of reference of the audit assignment Establish familiarity with the nature and activities of the subject organization, including information systems, relevant documentation, results of previous audits or reviews Establish (and, where appropriate, plan) the required audit process, including documentation Implement audit process in relation to specific financial representations Report audit results in an appropriate form to relevant recipients 	Supervised					
Unit 2 Able to examine compliance Examples <ul style="list-style-type: none"> Establish scope, objective and terms of reference of the audit assignment Establish familiarity with the nature and activities of the subject organization, including information systems, relevant documentation, results of previous audits or reviews Establish (and where appropriate plan) the required audit process, including documentation Implement audit process in relation to specific activities, systems or processes and evidence of compliance Report audit results in appropriate form to relevant recipients 	Supervised					
Unit 3 Able to apply auditing standards Examples <ul style="list-style-type: none"> Maintain current awareness of auditing standards and related pronouncements Analyze individual audit tasks or assignments to identify relevant auditing standards Seek authoritative opinion on apparent conflict of standards or other anomalies Apply the relevant standards, with appropriate documentation as required 	Independent					

No. of sheets	of
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BASIC PRACTICAL EXPERIENCE COMPONENTS

(Please use one sheet for each employment if more than one employer)

Name of Prospective Member: _____

Name of Organization: _____

Name of Counselor/Authorized Supervisor: _____

Competency required	Minimum level attained (Note 3.6)	Training Year				
		Year 1	Year 2	Year 3	Year 4	Year 5
Please ✓ if achieved						
Auditing and internal auditing (Continued)						
Unit 4 Able to implement audit processes Examples <ul style="list-style-type: none"> • Establish familiarity with the nature and activities of the subject organization, including information systems, relevant documentation, results of previous audits or reviews • Establish (and, where appropriate, plan) the required audit process, including documentation • Identify relevant organizational and managerial processes and systems • Identify and apply appropriate performance indicators and benchmarks • Implement audit process in relation to specific areas of activity and systems as basis for required evaluation • Report in appropriate form to authorized recipients 	Supervised					
Unit 5 Able to prepare audit reports and management letters Examples <ul style="list-style-type: none"> • Maintain awareness of current practice and requirements, including all applicable auditing standards and pronouncements • Draft audit report with due regard to scope and terms of reference of the audit, ethical and professional standards and legal requirements • Arrange for appropriate discussion and communication with authorized recipients 	Supervised					
Unit 6 Able to identify and evaluate internal control systems Examples <ul style="list-style-type: none"> • Review and evaluate documentation on system operation and allocation of functions; • Test for compliance with control and related requirements. 	Independent					
Other competencies achieved (please specify):						

No. of sheets	of
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Training Year	Year 1	Year 2	Year 3	Year 4	Year 5
---------------	--------	--------	--------	--------	--------

No. of working days attained for this Component:					
Counselor/Authorized Supervisor's Initial#:					

No. of working days attained for this Component:					
Counselor/Authorized Supervisor's Initial#:					

If there is/was a change of Authorized Supervisor or Counselor during the employment of the prospective member, each of them should initial against the no. of working days attained for this component under his/her supervision.

BASIC PRACTICAL EXPERIENCE COMPONENTS

(Please use one sheet for each employment if more than one employer)

Name of Prospective Member: _____

Name of Organization: _____

Name of Counselor/Authorized Supervisor: _____

Competency required	Minimum level attained (Note 3.6)	Training Year				
		Year 1	Year 2	Year 3	Year 4	Year 5
Please ✓ if achieved						
Financial management						
Unit 1 Able to analyze business data Examples <ul style="list-style-type: none"> Identify relevant available financial and non-financial data, both past and projected Where necessary, locate additional relevant data by enquiries and develop further projections Analyze the available data, using appropriate financial and non-financial indicators and benchmarks Identify and report on perceived deviations from the organization's desired or planned situation 	Independent					
Unit 2 Able to prepare financial forecasts Examples <ul style="list-style-type: none"> Maintain operational facility in the use of modern methods of financial planning and budgeting and of project evaluation techniques Identify and select appropriate input data for application of appropriate tools or models Implement analytical techniques capable of yielding the required forecasts Develop effective means of communicating forecast results, identifying assumptions employed in their preparation 	Supervised					
Other competencies achieved (please specify):						

No. of sheets _____ of _____

Training Year	Year 1	Year 2	Year 3	Year 4	Year 5
---------------	--------	--------	--------	--------	--------

No. of working days attained for this Component:					
Counselor/Authorized Supervisor's Initial [#] :					

No. of working days attained for this Component:					
Counselor/Authorized Supervisor's Initial [#] :					

If there is/was a change of Authorized Supervisor or Counselor during the employment of the prospective member, each of them should initial against the no. of working days attained for this component under his/her supervision.

BASIC PRACTICAL EXPERIENCE COMPONENTS*(Please use one sheet for each employment if more than one employer)*

Name of Prospective Member: _____

Name of Organization: _____

Name of Counselor/Authorized Supervisor: _____

Competency required	Minimum level attained (Note 3.6)	Training Year				
		Year 1	Year 2	Year 3	Year 4	Year 5
		Please ✓ if achieved				
Taxation						
Unit 1 Able to determine tax situation of a business Examples <ul style="list-style-type: none"> • Maintain awareness of current Hong Kong legislation and other factors determining the taxation situation of an unincorporated business, a partnership or a company • Analyze the financial records, activities and other relevant circumstances of a business and identify the applicable tax considerations • Apply the tax requirements to past or projected activities and financial results, as appropriate, to determine the impact in terms of liability for taxation 	Supervised					
Unit 2 Able to operate or design tax-related systems Examples <ul style="list-style-type: none"> • Maintain detailed understanding and familiarity with the organization's systems for tax-related transactions • Monitor possible improved methods or systems • Identify and record tax-related transactions in accordance with approved procedures • Ensure that tax liabilities are matched by availability of funds within required time frames 	Supervised					
Unit 3 Able to recognize the impact of taxes and duties Examples <ul style="list-style-type: none"> • Maintain up-to-date knowledge of the provisions for all relevant taxes and duties and identify categories of proposed or actual activities to which such provisions may apply • Identify the specific impact of applicable provisions for all relevant taxes or duties to individual activities or plans 	Supervised					
Other competencies achieved (please specify):						

No. of sheets	of
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Training Year	Year 1	Year 2	Year 3	Year 4	Year 5
---------------	--------	--------	--------	--------	--------

No. of working days attained for this Component:					
Counselor/Authorized Supervisor's Initial [#] :					

No. of working days attained for this Component:					
Counselor/Authorized Supervisor's Initial [#] :					

If there is/was a change of Authorized Supervisor or Counselor during the employment of the prospective member, each of them should initial against the no. of working days attained for this component under his/her supervision.

PRINCIPAL PRACTICAL EXPERIENCE COMPONENTS*

(Please use one sheet for each employment if more than one employer)

Name of Prospective Member: _____

Name of Organization: _____

Name of Counselor/Authorized Supervisor: _____

Competency required	Minimum level attained (Note 3.6)	Training Year				
		Year 1	Year 2	Year 3	Year 4	Year 5
		Please ✓ if achieved				
<p><u>Financial accounting and external reporting</u></p> <p>Unit 1 Able to apply accounting standards</p> <p>Examples</p> <ul style="list-style-type: none"> • Maintain awareness of all current accounting standards and pronouncements • Identify standards and pronouncements relevant to the individual task • Apply relevant standards and pronouncements appropriately to the task • Understand and maintain a current knowledge of the source of all reporting requirements • Identify potential areas of conflict or ambiguity in applying the various requirements 	Independent					
<p>Unit 2 Able to evaluate and develop accounting and information systems which meets an organization's financial reporting requirements</p> <p>Examples</p> <ul style="list-style-type: none"> • Review and analyze specifications of information systems • Maintain an awareness of the current developments in information technology, with a working knowledge of alternative processing methods, including manual, mechanical and various computer-based systems • Review operation of information systems and evaluate in terms of user needs, reliability of outputs and adequacy of controls and security • Ensure the adequacy of all required financial accounting records and outputs, including payroll, accounts receivable and invoicing, accounts payable and payments applications, as well as financial reports • Understand source and methods of acquiring necessary inputs and their validation • Maintain ability to operate information system effectively and to evaluate specific outputs required • Contribute from an accounting and internal control perspective to the design and specification of new or amended information systems • Contribute to the organized, timely and effective implementation of new or revised information systems, including associated staff training 	Independent					

* At least 3 competency units in any Principal component or in a combination of Principal components must be achieved.

No. of sheets	of
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PRINCIPAL PRACTICAL EXPERIENCE COMPONENTS*

(Please use one sheet for each employment if more than one employer)

Name of Prospective Member: _____

Name of Organization: _____

Name of Counselor/Authorized Supervisor: _____

Competency required	Minimum level attained (Note 3.6)	Training Year				
		Year 1	Year 2	Year 3	Year 4	Year 5
Please ✓ if achieved						
Financial accounting and external reporting <i>(Continued)</i> Unit 3 Able to determine the external reporting policies and prepare reports Examples <ul style="list-style-type: none"> Determine the external reporting policies of the organization Evaluate information systems required to provide required input data for reliability, timeliness and completeness Select appropriate data and prepare reports in required format, including, where applicable, group accounts Arrange dissemination of reports in accordance with requirements and policies 	Independent					
Unit 4 Able to manage external reporting as a functional area within the organization Examples <ul style="list-style-type: none"> Identification of critical tasks Review of external reports in relation to user needs and regulatory requirements Review of process of conversion of data into external reports 	Independent					
Other competencies achieved (please specify):						

* At least 3 competency units in any Principal component or in a combination of Principal components must be achieved.

No. of sheets	of
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Training Year	Year 1	Year 2	Year 3	Year 4	Year 5
---------------	--------	--------	--------	--------	--------

No. of working days attained for this Component:					
Counselor/Authorized Supervisor's Initial [#] :					

No. of working days attained for this Component:					
Counselor/Authorized Supervisor's Initial [#] :					

If there is/was a change of Authorized Supervisor or Counselor during the employment of the prospective member, each of them should initial against the no. of working days attained for this component under his/her supervision.

PRINCIPAL PRACTICAL EXPERIENCE COMPONENTS**(Please use one sheet for each employment if more than one employer)*

Name of Prospective Member: _____

Name of Organization: _____

Name of Counselor/Authorized Supervisor: _____

Competency required	Minimum level attained (Note 3.6)	Training Year				
		Year 1	Year 2	Year 3	Year 4	Year 5
		Please ✓ if achieved				
<u>Auditing and internal auditing</u> Unit 1 Able to determine nature and scope of audit assignment Examples <ul style="list-style-type: none"> • Use discussions with client or employer to establish agreement on nature and scope of the assignment • Prepare appropriate documentation for internal use and in external audits for the information of the client, e.g. engagement letter 	Supervised					
Unit 2 Able to assess the audit risk Examples <ul style="list-style-type: none"> • In the case of repeat audits, check past documentation to identify problem areas or potential issues • In all cases review the managerial and organizational structure of the organization • Gain familiarity with the business environment within which the organization operates • Obtain an assessment of the internal control systems and the level of compliance 	Independent					
Unit 3 Able to implement audit procedures Examples <ul style="list-style-type: none"> • Having defined the scope, objective and terms of reference of the audit assignment, establish familiarity with the nature and activities of the subject organization, including information systems, relevant documentation, results of previous audits or reviews • Establish (and, where appropriate, plan) the required audit process, including documentation • Provide for comprehensive audit working papers embodying the audit plan • Establish effective working liaison with the relevant staff of the subject organization and ensure clear communication • Implement audit process in relation to specific financial representations and non-financial representations • Report audit results in appropriate form to relevant recipients, using both oral and written communication 	Independent					

* At least 3 competency units in any Principal component or in a combination of Principal components must be achieved.

No. of sheets	of
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PRINCIPAL PRACTICAL EXPERIENCE COMPONENTS**(Please use one sheet for each employment if more than one employer)*

Name of Prospective Member: _____

Name of Organization: _____

Name of Counselor/Authorized Supervisor: _____

Competency required	Minimum level attained (Note 3.6)	Training Year				
		Year 1	Year 2	Year 3	Year 4	Year 5
Please ✓ if achieved						
<u>Auditing and internal auditing</u> <i>(Continued)</i> Unit 4 Able to examine compliance Examples <ul style="list-style-type: none"> • Having defined the scope, objective and terms of reference of the audit assignment, establish familiarity with the nature and activities of the subject organization, including information systems, relevant documentation, results of previous audits or reviews • Establish (and, where appropriate, plan) the required audit process, including documentation • Implement audit process in relation to specific activities, systems or processes and evidence of compliance • Report audit results in appropriate form to relevant recipients 	Independent					
Unit 5 Able to apply auditing standards Examples <ul style="list-style-type: none"> • Maintain a full current knowledge of the source of all auditing standards and other related mandatory requirements • Maintain a full current awareness of the content and significance of all auditing standards and related pronouncements • Analyze individual audit tasks or assignments to identify relevant auditing standards • Seek authoritative opinion on apparent conflict of standards or other anomalies • Apply the relevant standards, with appropriate documentation as required 	Independent					
Unit 6 Able to implement audit process Examples <ul style="list-style-type: none"> • Establish familiarity with the nature and activities of the subject organization, including information systems, relevant documentation, results of previous audits or reviews • Establish (and, where appropriate, plan) the required audit process, including documentation • Identify relevant organizational and managerial processes and systems • Identify and apply appropriate performance indicators and benchmarks • Implement the audit process in relation to specific areas of activity and systems as the basis for required evaluation • Report in appropriate form to authorized recipients 	Independent					

* At least 3 competency units in any Principal component or in a combination of Principal components must be achieved.

No. of sheets	of
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PRINCIPAL PRACTICAL EXPERIENCE COMPONENTS*

(Please use one sheet for each employment if more than one employer)

Name of Prospective Member: _____

Name of Organization: _____

Name of Counselor/Authorized Supervisor: _____

Competency required	Minimum level attained (Note 3.6)	Training Year				
		Year 1	Year 2	Year 3	Year 4	Year 5
		Please ✓ if achieved				
<u>Auditing and internal auditing</u> (Continued) Unit 7 Able to prepare audit reports and management letters Examples <ul style="list-style-type: none"> • Maintain awareness of current practice and requirements, including all applicable auditing standards and pronouncements • Draft audit report with due regard to scope and terms of reference of the audit, ethical and professional standards and legal requirements • Arrange for appropriate discussion and communication with authorized recipients 	Supervised					
Unit 8 Able to evaluate and improve internal control systems Examples <ul style="list-style-type: none"> • Review and evaluate documentation on system operation and allocation of functions on a comprehensive basis, including the interaction between different systems or sub-systems • Test for compliance with control and related requirements and take appropriate steps to improve compliance where necessary 	Independent					
Other competencies achieved (please specify):						

* At least 3 competency units in any Principal component or in a combination of Principal components must be achieved.

No. of sheets	of
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Training Year	Year 1	Year 2	Year 3	Year 4	Year 5
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No. of working days attained for this Component:					
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Counselor/Authorized Supervisor's Initial [#] :					
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Competency required	Minimum level attained (Note 3.6)	Training Year				
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Financial management						
Unit 1 Able to analyze business data Examples <ul style="list-style-type: none"> Identify relevant available financial and non-financial data, both past and projected Where necessary, locate additional relevant data by enquiries and develop further projections Analyze the available data, using appropriate financial and non-financial indicators and benchmarks Identify and report on perceived deviations from the organization's desired or planned situation 	Independent					
Unit 2 Able to prepare financial forecasts Examples <ul style="list-style-type: none"> Maintain operational facility in the use of modern methods of financial planning and budgeting and of project evaluation techniques Identify and select relevant input data for application of appropriate tools or models Implement analytical techniques capable of yielding the required forecasts Develop effective means of communicating forecast results, identifying assumptions employed in their preparation 	Independent					
Unit 3 Able to develop financial systems Examples <ul style="list-style-type: none"> Analyze the range of transactions involved in the organization's current and projected operations, with particular reference to cash flows and transactions involving securities Review existing systems and controls over cash and securities and develop proposed amendments to cover any perceived deficiencies Develop, if necessary, and operate a system for the projection of cash flows and cash budgeting 	Independent					
Unit 4 Able to contribute to strategies and business planning Examples <ul style="list-style-type: none"> Become familiar, to the extent approved by management, with the organization's business plans and, as required, apply appropriate financial analysis techniques to assess risks and propose appropriate risk strategies Provide analysis as required to guide the organization's financing operations, including the management of capital structures, liability portfolios and surplus funds 	Supervised					

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Financial management <i>(Continued)</i>						
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<u>Taxation</u> Unit 1 Able to determine tax situation of a corporate or an individual Examples <ul style="list-style-type: none"> • Maintain awareness of current Hong Kong legislation and other factors determining the taxation situation of an unincorporated business, a partnership or a company or other organization and of individuals, including profits tax, salaries tax, property tax, personal assessment and stamp duty • Analyze the financial records, activities and other relevant circumstances of a business or individual and identify the applicable tax considerations • Apply the tax requirements to past or projected activities and financial results, as appropriate, to determine the impact in terms of liability for taxation • Identify legal methods of tax planning applicable to the situation of the particular entity 	Independent					
Unit 2 Able to operate or design tax-related systems Examples <ul style="list-style-type: none"> • Maintain detailed understanding and familiarity with the organization's systems for tax-related transactions • Monitor possible improved methods or systems • Identify and record tax-related transactions in accordance with approved procedures • Ensure that tax liabilities are matched by availability of funds within required time frames 	Independent					
Unit 3 Able to recognize the impact of taxes and duties Examples <ul style="list-style-type: none"> • Maintain up-to-date knowledge of the provisions for all relevant taxes and duties and identify categories of proposed or actual activities to which such provisions may apply • Identify the specific impact of applicable provisions for all relevant taxes or duties to individual activities or plans 	Independent					

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Name of Organization: _____

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Competency required	Minimum level attained (Note 3.6)	Training Year				
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Taxation <i>(Continued)</i>						
Other competencies achieved (please specify):						

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Competency required	Minimum level attained (Note 3.6)	Training Year				
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		Please ✓ if achieved				
<u>Management accounting</u> Unit 1 Able to participate in resource-related direction setting Examples <ul style="list-style-type: none"> • Be familiar with internal and relevant external data sources and provide appropriate inputs, financial and non-financial, to assist in strategy formation • Apply appropriate analytical and modeling tools to the evaluation of alternatives and assessment of risk factors • Assist in strategy formation processes, including data gathering structures, SWOT analysis and other strategic planning techniques • Analyze the cash flow and financing implications of proposed strategies 	Supervised					
Unit 2 Able to appraise project Examples <ul style="list-style-type: none"> • Analyze the cash flow and financing implications of a proposed project • Select appropriate appraisal techniques and apply to the available data • Analyze results, making allowance for relevant non-financial factors, risk and inflation • Carry out post-implementation audits of projects 	Independent					
Unit 3 Able to design, implement and review performance measurement systems Examples <ul style="list-style-type: none"> • Become familiar with the performance indicators applicable to the organization in respect of both specific operations and the responsibilities of individual staff members • Assess the level of compliance with established procedures and identify any limitations in those procedures, developing suggested amendments where necessary • Develop comprehensive budgets in accordance with the procedures adopted by the organization, using budget models and spreadsheets as appropriate • Ensure the timely and accurate operation of a system to capture actual results in a form comparable with budget figures • Calculate and analyze variances between budget and actual results • Communicate results of variance analysis to approved recipients, and where necessary develop a suitable pattern or system of internal reporting • Monitor, analyze and report on segment performance 	Independent					

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Competency required	Minimum level attained (Note 3.6)	Training Year				
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Management accounting <i>(Continued)</i> Unit 4 Able to operate and develop a cost accounting system Examples <ul style="list-style-type: none"> • Be fully familiar with all main types of cost accounting systems, including alternative methods of dealing with overhead or common costs, and the criteria for their appropriate use • Review existing cost systems for adequacy and appropriateness, and where necessary develop proposals for improvements by amendment or replacement • Ensure that procedures for inputting data into existing cost systems are operating in a satisfactory manner • Analyze the output of cost systems to provide required information to authorized users • Undertake individual studies of cost behavior, actual and projected, as required to meet management needs for information, making assumptions used explicit 	Independent					
Other competencies achieved (please specify):						

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Competency required	Minimum level attained (Note 3.6)	Training Year				
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		Please ✓ if achieved				
<u>Information management and technology</u> Unit 1 Able to assist in information systems assessment and strategy formation Examples <ul style="list-style-type: none"> Acquire operational familiarity with the hardware and software characteristics of the information and communication systems of the organization (own employer or client) Monitor and attain knowledge of current technological developments in all aspects relevant to business and related organizations Review existing systems and documentation in discussion with users to assess needs for new or amended equipment configuration, network or other operating system software, application software and external communications arrangements Evaluate and compare alternative approaches on a cost-benefit basis, with full recognition of user needs, security, related staff training maintenance costs and other relevant factors 	Supervised					
Unit 2 Able to assist in implementing information systems Examples <ul style="list-style-type: none"> Participate in system design or redesign ensuring adherence to high standards of security and ability to rescale system if expansion required Participate in implementation of selected systems with adequate testing, staff training and documentation within agreed time schedule 	Independent					
Unit 3 Able to operate information systems Examples <ul style="list-style-type: none"> Maintain clear and comprehensive documentation of the system and its operation Ensure that staff are adequately trained and briefed on their responsibilities Allocate duties in a manner consistent with a high standard of internal control Maintain back-up arrangements for both data and systems to facilitate rapid recovery and protection of records Monitor opportunities for the organization to benefit from the rapid development of communications technology, including e-mail, e-commerce and other Internet applications, subject to reliable security measures 	Supervised					

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<u>Information management and technology</u> <i>(Continued)</i>						
Other competencies achieved (please specify):						

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<p><u>Insolvency</u></p> <p>Unit 1 Able to assess commercial viability</p> <p>Examples</p> <ul style="list-style-type: none"> • Assess the competitive position of the organization in terms of products, services and markets • Assess the financial position of the organization using appropriate tools of financial analysis • Review the current and future environment of the organization in relation to its available resources and personnel • Evaluate the viability of the organization 	Supervised					
<p>Unit 2 Able to assist in establishing strategic possibilities</p> <p>Examples</p> <ul style="list-style-type: none"> • Apply strategic management tools, including data gathering structures, SWOT analysis and other strategic planning techniques • Analyze alternative possibilities using financial modeling and risk analysis 	Independent					
<p>Unit 3 Able to assist in managing the reconstruction</p> <p>Examples</p> <ul style="list-style-type: none"> • Prepare a business plan using financial modeling and related techniques • Review possibilities for down-sizing and other cost reduction strategies • Monitor changes and performance on a continuing and detailed basis 	Supervised					
<p>Unit 4 Able to assist in liquidations and winding up process</p> <p>Examples</p> <ul style="list-style-type: none"> • Maintain comprehensive knowledge of legal requirements and procedures for winding up of incorporated entities and similar provisions for other entities • Prepare required documentation for submission to all relevant parties, including creditors, regulatory authorities and management • Explore avenues for advantageous disposal of the undertaking or individual assets or asset groups and prepare appropriate financial projections • Prepare documentation relevant to negotiations with interested parties 	Supervised					

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		Please ✓ if achieved				
Insolvency (Continued)						
Other competencies achieved (please specify):						

* At least 3 competency units in any Principal component or in a combination of Principal components must be achieved.

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GENERIC COMPETENCIES **(all competencies have to be attained)*

(Please use one sheet for each employment if more than one employer or in case there is a change of Counselor or Authorized Supervisor)

Name of Prospective Member: _____

Name of Organization: _____

Name of Counselor/Authorized Supervisor: _____

	Please ✓ if achieved
<p><u>Creative thinking, reasoning and analysis</u></p> <p>Able to provide creative thinking and to deal with unstructured and unfamiliar problems and situations</p> <p>Evidenced by:</p> <ul style="list-style-type: none"> • Able to identify, and research relevant issues, and to critically assess and analyze relevant information. • Able to embrace lifelong learning and undertake appropriate continuing professional development activities to keep competencies up-to-date. • Able to apply an awareness of the legal, regulatory and economic environment of business and other organizations (including the law relating to business transactions, business entities and taxation) in practice. • Able to apply the basic understanding to other business functions in relation to operating in the accounting function. • Able to apply relevant academic skills (e.g. analysis techniques, usage of figures and data) to the business context. • Able to operate with an understanding of the social, economic, regulatory and political environment relating to business organizations in China. • Able to operate with an understanding of the regulatory environment of accounting in China. • Able to integrate the results of enquiries, research and analysis, making appropriate ethical and value judgements and allowing for the organizational and cultural context, to arrive at valid and effective conclusions. • Able to apply appropriate modeling and quantitative analysis techniques to assist in forecasting or otherwise providing a logical basis for identifying and selecting among feasible solutions or courses of action. • Able to structure and prioritize key issues and apply logical reasoning to solve problems. 	
<p><u>Communications and interpersonal relationships</u></p> <p>Able to communicate effectively in written or other visual form and to interact effectively with individuals or groups of diverse cultural and intellectual backgrounds and status</p> <p>Evidenced by:</p> <ul style="list-style-type: none"> • Able to communicate complex information and ideas both in writing and orally in a clear and concise style, appropriate to the other participant(s) in meetings, small groups or personal conversation. • Able to communicate competently in both written and spoken English, Chinese and Putonghua in a manner appropriate for the business setting to present, discuss, report and defend views. • Able to present arguments and thoughts in a structured, logical and systematic way to defend own view or to justify the outcome or solution proposed. • Able to explain concepts, issues and problems in layman terms to others who do not possess technical accounting knowledge. • Able to participate constructively and proactively as a member of a team and, where appropriate, to provide effective leadership to groups or individuals in both work and training situations. • Able to undertake effective negotiation to achieve mutually acceptable solutions to situations involving differing interests. • Able to listen attentively and effectively to others • Able to listen and exercise authority understanding the importance of team dynamics • Able to judge when to involve others for problem solving, and what help would be needed • Able to facilitate others adapting to changes 	

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GENERIC COMPETENCIES (Continued)*(Please use one sheet for each employment if more than one employer or in case there is a change of Counselor or Authorized Supervisor)*

Name of Prospective Member: _____

Name of Organization: _____

Name of Counselor/Authorized Supervisor: _____

	Please ✓ if achieved
<p><u>Organization-specific competencies</u></p> <p>Able to apply effectively a clear understanding of the objectives and standards of the organization in which employed</p> <p>Evidenced by:</p> <ul style="list-style-type: none"> • Able to use effectively both the formal and the informal channels of communication within the organization, with due regard for policies, cultural and ethical considerations. • Able to document work to the appropriate standard. • Able to establish, maintain and promote positive relationships with personnel at all relevant levels of the organization. • Able to represent effectively the interests of the organization in dealings with external parties, including customers or clients, suppliers, regulatory authorities competitors, shareholders and other stakeholders. • Able to facilitate and adapt constructively to change, whether in the external environment of the organization, the internal structure and activities of the organization or the personal role and responsibilities of the candidate. • Able to plan, resource and control projects to deliver key outcomes. • Able to lead others to accomplish the common goal in teamwork through providing direction and guidance as appropriate. • Able to provide additional support and resources, as appropriate, to team members to finish tasks. 	
<p><u>Personal and behavioural</u></p> <p>Able to consistently demonstrate personal integrity, professional values, ethical conduct and motivation to meet professional standards of conduct and dedication in all work assignments and responsibilities</p> <p>Evidenced by:</p> <ul style="list-style-type: none"> • Able to practise effective time management, including sound judgment in allocating priorities and organising activities. • Able to effectively organize activities by setting goals, objectives and implement actions to complete task on time and meet expectation. • Able to have an understanding of organizational behaviour and human resource management. • Able to demonstrate appropriate ethical behaviour in a variety of business situations. • Able to demonstrate a commitment to continuous learning and improvement. • Able to judge when and how to solve problems independently. • Able to proactively and confidently highlight potential problems and possible solutions to senior level as appropriate. • Able to cope with stressful work demand effectively and maintain work-life balance. • Able to maintain composure and show persistence to work through challenges. 	
<p><u>Information technology</u></p> <p>Able to use information technology effectively within an organization by rapidly developing a comprehensive working knowledge of the existing systems</p> <p>Example</p> <ul style="list-style-type: none"> • Able to use personal computers and workstations effectively over a range of commonly required applications, including word processing, spreadsheets, databases, presentation software, communications and also the Internet for e-mail and information search and retrieval • Able to have an understanding of the employer's IT security and control policies 	

Counselor/Authorized Supervisor's initial	
No. of sheets	of
Total no. of sheets submitted	