



CAPA Session

Accounting Technicians:

Exploring Opportunities for the Profession

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About the IPA Group

- The Institute of Public Accountants (IPA) is one of the three legally recognized professional accounting bodies in Australia;
- The Institute of Financial Accountants (IFA) is one of seven recognized professional accounting bodies in the UK;
- In existence for nearly 100 years, founded in 1923;
- Supporting over 50,000 members and students in 100 countries;
- Offices in Australia, UK, China, Hong Kong and Malaysia;
- Acquired the IFA - UK in 2015;
- Acquired the Association of Accounting Technicians (AAT) of Australia in 2021;
- Full member of the International Federation of Accountants (IFAC); and
- Our members work within micro and small to medium sized enterprises (SMEs) or micro and small to medium sized accounting practices (SMPs) advising micro and SME clients.



Our IPA Group brands



Our mission

“To improve the quality of life of small business”

- The IPA Group is the world’s largest SME/SMP professional accountancy group
- Dedicated to supporting the SME sector
- More than 75% of our members own a small business or an accountancy practice serving small business clients



Certified Accounting Technician (CAT) program



Unique, Flexible and Global.

Setting a new standard of education and recognition for accounting technicians.

Launched to IPA Group members in December 2021



Certified Accounting Technician (CAT) program

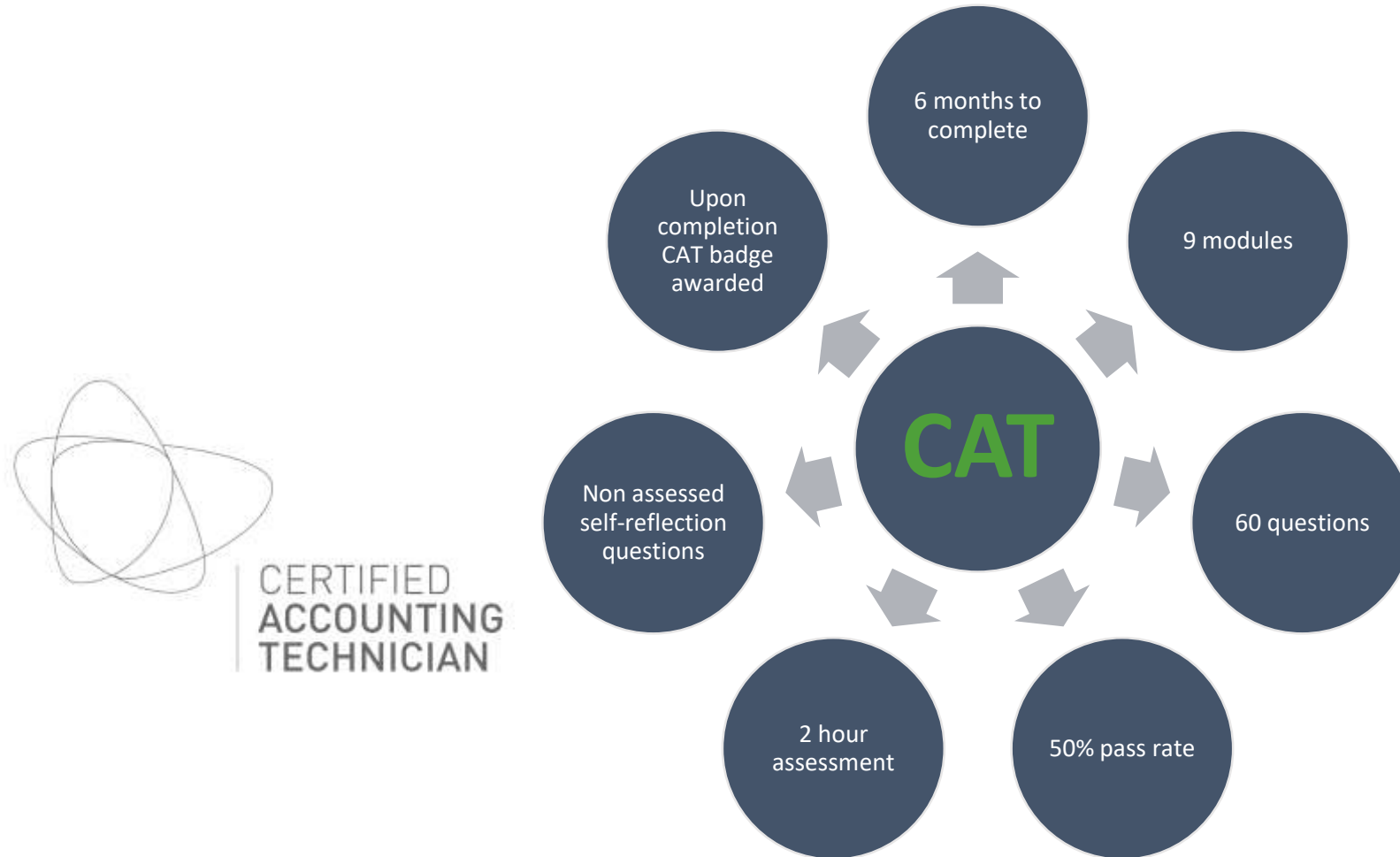
Overview:

- A first in the Australian market
- Set a new standard and brings a unique level of recognition for technicians in the marketplace, along with expanded career possibilities
- Created by the IPA Group and AAT leading practitioners running their own successful businesses
- Appropriate for BAS agents at all stages of their journey - whether as a sole practitioner and starting out in business or expanding or running a business/and team
- An opportunity to gain not only a recognised certification, but also contributes towards IPA Group/AAT member Continuing Professional Development requirements



Certified Accounting Technician (CAT) Program

Designed to address the on-going advancements and trends in the accounting industry



Certified Accounting Technician Program



1	ACCOUNTING TECHNICIAN IN PLACE <i>All the things you need to know before you go into practice</i>	Module 1	Module 2	Module 3
		Introduction to the Accounting Profession	Ethics and Standards	Professional Education
		<ol style="list-style-type: none"> 1. Program Overview 2. Evolution of the Accounting Technician 3. Public Practice Entry Options 4. Market Trends Affecting Practice Owner 5. Practice Growth Opportunities 6. Business Planning Fundamentals 	<ol style="list-style-type: none"> 1. AAT Code of Ethics 2. Australian Accounting Standards Board (AASB) 3. TPB Code of Professional Conduct 4. Statutory Registrations 5. Relevant Laws for Accounting Technicians 6. Regulatory Compliance 	<ol style="list-style-type: none"> 1. Currency of Knowledge (Technical and Software) 2. Research and Knowledge Management 3. Continuing Professional Development 4. Association Education Opportunities 5. Leveraging Industry Connections
2	ACCOUNTING TECHNICIAN IN PRACTICE <i>All the things you need to know once you are in practice</i>	Module 4	Module 5	Module 6
		Practice Essentials	Practice Security	People and Processes
		<ol style="list-style-type: none"> 1. Basics of Contract Law 2. Fee Structure and Engagement Terms 3. Professional Quality and Standards of Work 4. Client Onboarding Process 5. Managing Client Expectations 6. Insurances 	<ol style="list-style-type: none"> 1. Risk Management 2. Privacy Policy and Confidentiality 3. Internal Accounting Controls 4. Protecting Your Practice with Cyber Security 	<ol style="list-style-type: none"> 1. People and Culture 2. Employees and Contractors 3. Offshoring 4. Training and Development 5. Identifying Bottlenecks 6. Practice Workflow
3	ACCOUNTING TECHNICIAN IN BUSINESS <i>All the things you need to know to evolve your business</i>	Module 7	Module 8	Module 9
		Growing Your Business	Evolving Your Business	Sustaining Your Business
		<ol style="list-style-type: none"> 1. Business Planning For Growth 2. Financing For Growth 3. Insightful Client Accounting and Advisory Services 4. Marketing Yourself as an Expert 	<ol style="list-style-type: none"> 1. Defining Your Online Strategy 2. Creating a Digital Transformation Framework 3. Digital Leadership Mindset 4. Agility and Change 	<ol style="list-style-type: none"> 1. Prioritising Wellbeing 2. Coaching and Mentoring 3. Sustainable Business 4. Program Sum-up



Questions & discussion

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