

ifs Chartered Associateship

In today's financial services environment, professionals understand the importance of being able to demonstrate that their technical, professional and academic understanding is up-to-date at all times.

Chartered Associateship is a professional designation awarded to experienced Alumni Members who have successfully completed an **ifs** BSc (Hons) degree or Associateship qualification and undertaken a programme of post qualification Continuing Professional Development. Once Chartered Associate status has been gained, it must be maintained through an annual CPD programme.

Chartered Associateship gives formal recognition to the application of experience and academic understanding as it sits within a structured CPD scheme. As a result **ifs** alumni are confidently able to demonstrate ongoing commitment to their own Continuing Professional Development.

The benefits of Chartered Associateship

Holders can effectively demonstrate that they possess not only technical capability and skills, but also professional ability and experience.

Holders receive ongoing recognition of their essential Continuing Professional Development activities and their commitment to improving professional standards within financial services.

Chartered Associateship is a mark of academic achievement that is not only learning of the highest order, but also learning that is ongoing and linked to innovative achievement.

Completion

All CPD activities are recorded via the **ifs** online CPD service, **myCPD**. Once the criteria have been met, participants will be able to use the title Chartered Associate of the **ifs** School of Finance or the designation CAifs, and have their name included in the online Chartered Directory. In addition they will also receive a dated certificate and Chartered card, which will be reissued on completion of subsequent years' CPD requirements.



'As Head of UK Real Estate for HSBC Bank plc, I am passionate in my belief in and drive for knowledgeable and properly skilled managers.

Internally this is being achieved through a series of cutting edge, bespoke training courses which not only kick starts their professional development but also links seamlessly with the **ifs** Chartered Associateship programme. Once achieved, this becomes a first class, visible, external demonstration of both our commitment to professional excellence as well as continual and ongoing professional development. I am delighted that in the way this has been embraced within HSBC and look forward to an increasing number of managers achieving this award.'

Andy Armstrong,
Head of UK Real Estate, HSBC Bank plc

'Given it had been some time since I passed my degree and other regulatory certificates, I began to feel that the knowledge I had learned had begun to go out of date. I think it is invaluable both to myself (for my career development) and to Barclays that I keep my knowledge as up to date as I can in the ever-changing world of financial services. Having looked at my options via the **ifs** website, I decided that the Chartered Associateship would best suit my learning style, while allowing me to update my knowledge and learn new skills.'

John Sprigg CAifs, AdvCeMAP, CeFA,
Operations Manager, Barclays Bank

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How is Chartered Associateship achieved?

To achieve Chartered Associateship, participants need to successfully complete three phases.

Phase 1: Development statement – the development statement should include an outline of your development objectives, a summary of your development plan and the benefits of successfully achieving your development plan.

Phase 2: Logging of CPD hours – 15 hours of quality CPD should be directly linked to the objectives laid out in your development statement and be demonstrably relevant to your current role and/or career aspirations within financial services.

Phase 3: Annual statement – the annual statement completes your CPD process for the current year. It should identify the ways and the extent to which the activities undertaken supported the objectives outlined in the development statement, and outline the development/learning objectives identified for the forthcoming year.

How to join

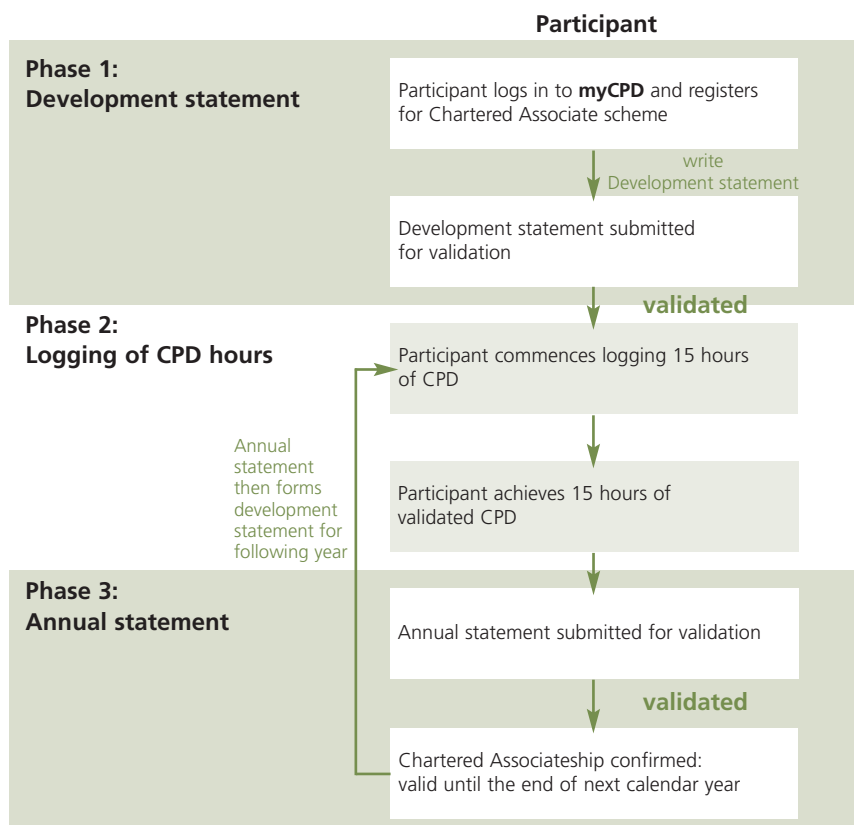
The scheme runs from 1 January to 31 December. Those eligible can apply to join at any time in the year. However, we would recommend that anyone wishing to join the scheme after 30 September defer their application until January of the following year as it will be difficult to achieve the requirements in the remaining time.

For further information on Chartered Associateship including fees and CPD requirements please visit our website at www.ifslearning.ac.uk/Alumni.

Alternatively, please log in to www.myifslearning.com using your **ifs** number and password. Go to **myCPD** click on the CAifs application link and follow the instructions.

If you have any questions or wish to discuss the scheme, please don't hesitate to call +44 (0) 1227 829 499 or email us at caifs@ifslearning.ac.uk.

Chartered Associateship progress



Eligibility

To be eligible for Chartered Associateship you must have:

- successfully completed an **ifs** BSc (Hons) or Associateship qualification
- at least 2 years' relevant work experience within financial services

Every effort was taken to ensure this information sheet was accurate at the time of going to press and the **ifs** School of Finance is not liable for any errors or omissions in this publication. The **ifs** reserves the right at any time and without notice to vary the content of its courses and syllabuses previously announced and to modify as appropriate the facilities and arrangements for students.

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