

# **IFA Direct**

# **Application form**

# **2020/2021**

## Completing and submitting your application form

Complete **ALL** sections of the form using block capitals and black ink for scanning purposes.

The information that you provide must be true, correct and up to date. It is your responsibility to inform us of any changes.

There are two ways to submit your application form, supporting documents and course module fee(s):

1. Email to [education@ifa.org.uk](mailto:education@ifa.org.uk)  
OR
2. Post to:

**Institute of Financial Accountants  
Education Department  
CS111, Clerkenwell Workshops  
27-31 Clerkenwell Close  
Farringdon  
London EC1R 0AT**

### Personal details required by CU Coventry

Reference number if previously a member or student of the IFA	
---	--

Title	
First name	
Middle name	
Surname	
Date of birth	
Address for correspondence	
Home telephone number	
Work telephone number	
Mobile telephone number	
Email address	
Job title	
Company	
Nationality	

Which contact details would you prefer us to use?	<b>HOME</b>	<b>OTHER</b>

If you have answered other above please provide alternative contact details	
---	--

Where did you hear about IFA Direct? Please tick.

Business Development team	IFA website	Social media	Word of mouth	Other (please specify)

### Qualifications

Please provide copies of relevant accountancy and/or tax qualifications, including qualification certificates and transcripts. These will be used to assess the modules you will need to undertake to be eligible to apply for membership of the IFA. If you intend to take the modules for CPD purposes you do not need to supply these to us although you should ensure that you are confident with the expected level of study.

I have attached copies of my transcripts and certificates.

### Timetable of modules 2020/2021

Module dates	Registration deadline	Module	Module	Module
8 June – 17 July 2020	14 May 2020	108	209	302
21 September – 30 October 2020	1 September 2020	103	203	
9 November – 18 December 2020	19 October 2020	104	208	
4 January – 12 February 2021	7 December 2020	107	201	301
22 February – 2 April 2021	1 February 2021	108	209	302
19 April – 28 May 2021	29 March 2021	103	203	
7 June – 16 July 2021	10 May 2021	104	208	

Please note it is only possible to book one module during each six-week period.

A booking form will be sent to you once your application form has been assessed

### Fees

The fee per module is £770.

### In public practice (UK only)

IFA Bye-laws state that:

7.5 Students shall not:

- (a) claim to be members of the Institute or use any of the Institute designations;
- (b) be, hold themselves out to be in Public Practice; or
- (c) be or hold themselves to be, a partner, director or LLP member of a firm engaged in public practice; or hold voting rights in a firm engaged in public practice.

In order to register as a student with the IFA please respond to the following statements

Question 1	YES	NO
Are you in public practice?		

	Employee	Partner	Director
If yes, please indicate whether you are:			

<b>Question 2</b>	<b>YES</b>	<b>NO</b>
Do you have voting rights?		

<b>Question 3</b>	<b>YES</b>	<b>NO</b>
If you are employed, do your clients believe you are a partner or director of the firm?		

**Permissions and interests**

Please indicate below how you would like the IFA to communicate with you regarding IFA business partner products and services, CPD events and workshops. The IFA’s preferred method of communicating is email and information regarding member offerings may not be available via other channels.

	<b>E-mail</b>	<b>Post</b>	<b>Telephone</b>	<b>Text</b>
I am happy to be contacted by the IFA by the following communication preferences				

Please indicate whether you are happy to be contacted as described below

	<b>YES</b>	<b>NO</b>
I want to be contacted by my local IFA branch chair about regular meetings and seminars that count towards my CPD and can help me in my career path.		
I want to be contacted by the IFA’s business partners		

**Declaration of applicant**

This is a formal agreement between you and the IFA as a professional membership body and you must adhere to the following undertakings. The IFA reserves the right to remove you from being a student or member of the IFA and potentially begin disciplinary proceedings if you provide false information.

<p>Please declare any spent or pending convictions. Students will be subject to the IFA’s Articles of Association, Bye-laws and regulatory system. By notifying the IFA now on any such matters the IFA will be able to advise you on any potential issues that may affect your future application for membership and your ability to practice.</p> <p>You must follow the IFA’s Bye-laws and student regulations and abide by the rules laid down for exams and conduct. By signing this you accept the IFA’s Bye-laws and student regulations.</p> <p>I confirm that I have read the IFA Bye-laws and student regulations and agree to comply with them.</p> <p>IFA Bye-laws and student regulations are available to download from the IFA website <a href="http://www.ifa.org.uk">www.ifa.org.uk</a>.</p> <p>I declare that:</p> <ul style="list-style-type: none"> <li>• to the best of my knowledge and belief all of the information given in this application is true and correct;</li> <li>• I understand that I must inform the IFA of any material changes to the information I have provided within 14 working days of the change; and</li> <li>• I understand that the IFA reserves the right to contact me and/or other relevant parties to verify any of the information provided in this form or appendices.</li> </ul>		
<b>Print your full name</b>	<b>Signature</b>	<b>Date (DD/MM/YYYY)</b>

## **IFA Data Protection**

The IFA takes your privacy seriously. All personal information provided to the IFA on this form or through any other method of communication is collected and held in accordance with GDPR.

We will treat your personal information in accordance with data protection legislation.

We will use your information for administering your student record and for communicating with you and eligibility for membership.

We will transfer your information outside the European Economic Area (EEA) e.g. IPA Group. These countries may not have similar data protection laws to the EEA, so if we do transfer your information we will take the necessary steps to ensure that your privacy rights are still protected.

Copies of the IFA Data Protection Policy and the Privacy and Cookie policies are available to view on the IFA website [www.ifa.org.uk/dataprotection](http://www.ifa.org.uk/dataprotection).