

The direct route to  
professional development  
for accountants and  
tax advisers

IFA **DIRECT.**®



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# A unique, modular way to continuing professional development

## IFA DIRECT.®

The IFA Direct programme consists of relevant, affordable and accessible study units which will enhance your professional reputation. By developing your knowledge and skills you will gain a broader and deeper understanding of key subjects relevant to accountants and tax advisers in, or supporting, small businesses.

IFA Direct is for you if you want to:

- achieve IFA membership
- invest in professional development
- gain an IFA practising certificate (UK members only)

### Membership

The IFA is a full member of the International Federation of Accountants (IFAC) the global accounting standard-setter and regulator. Membership delivers the enhanced professional recognition and career prospects that comes with being able to call yourself an IFA Financial Accountant or Tax Adviser. In addition, as an IFA Financial Accountant you will receive dual membership of the Institute of Public Accountants (Australia) and be able to use the designatory letters AFA/MIPA.

IFA membership brings access to a community of like-minded professionals who benefit from supportive branch meetings, expert technical materials and inspiring events and CPD workshops.

### Continuing professional development

Investing in relevant and regular CPD is an important way to stay abreast of new developments and best practice in a fast-changing environment. It can boost your motivation and improve the quality of your work and the service you provide.

### Gain a practising certificate

For UK-based members holding an IFA practising certificate means you can offer accountancy services to the general public and can do more than with many other associations and professional bodies. You'll be able to undertake charity independent examinations and ATOL/ Civil Aviation Authority work. And a wide range of banks and building societies accept reports signed by our practising members.

Find out more at [ifa.org.uk/ifadirect](http://ifa.org.uk/ifadirect)  
or call our Education Team now on +44 (0)20 3567 5999

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## Welcome to **IFA DIRECT.**

SME accountancy practitioners have always valued the benefits of learning through IFA Direct and it's now more flexible, accessible, and affordable than ever. The units have been specifically designed to have a focus on practice in SME and SMP environments and are more relevant to the size, scale and type of business that accountants are working with.

Discover more about the programme and how our students have tailored their learning to further their professional development.

**John Edwards CEO**  
**Institute of Financial Accountants**



## **Tarun Howlader** is studying towards gaining his practising certificate

### **Describe your background**

I have been working in this sector for 11 years and have an MBA in finance and MSc in cyber security.

### **Where is your firm based?**

We are based in Loughton, Essex.

### **What type of business does the practice engage in?**

We specialise in core accountancy to small and medium-sized businesses based both in the UK and overseas. We work with a diverse portfolio of clients of differing sizes and meet their requirements in terms of bookkeeping, VAT, payroll, accounts, tax issues, MTD, and GDPR compliance.

### **What do you find challenging/rewarding within the sector?**

Keeping up to date with the frequent changes in tax rules such as IR 35 reform, VAT reverse charge, and import VAT and the way to report them is challenging. However, there are many opportunities for continuous learning and professional development with a clear career path and huge earning potential. Technological advances, for example, making tax digital, are making life easier for many professionals and businesses.

### **How did you hear about IFA Direct?**

I came to know about the IFA from a Google search and from one of my colleagues.

### **Which units are you studying?**

I am studying  
Level 4 Personal Tax  
Level 4 Law of Accounting  
Level 5 Business taxation  
Level 5 Assurance  
Level 7 UK Taxation for Business and Individuals – Advanced

### **What did you like about the programme?**

It is very difficult to manage a job and study at the same time but the programme is well designed with plenty of materials and resources which makes it much easier.

### **How did you find the teaching and support?**

I've found that the units being online makes the content highly accessible from anywhere I might be. I am enjoying the teaching and level of support I am getting from my chosen training provider.

### **What are your plans to use IFA Direct for the future?**

I plan to start my own practice once I am qualified.

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# 14 units, two routes to membership

IFA Direct is administered in partnership with ATHE, a global awarding organisation regulated by Ofqual.

The programme comprises 14 flexible study units which are delivered online through a network of ATHE recognised centres.

You can study more than one unit at a time over a 4-6 week period and as they run continuously you can roll off one unit straight on to another meaning you never have to wait before starting a new subject. At the end of each unit you will complete a final assessment set by your centre.



## Associate AFA/MIPA route

### Level 4 units

- Financial Accounting 1
- Financial Accounting 2
- Budgetary Control
- Cost and Management Accounting
- Personal Taxation
- Business Environment
- Law for Accounting

### Level 5 units

- Financial Reporting
- Financial Management
- Financial and Management Control
- Business Taxation
- Assurance

### Level 7 units

- Core Reporting for Strategic Business – Advanced
- UK Taxation for Business and Individuals - Advanced

## Tax Adviser ATA route

### Level 4 units

- Financial Accounting 1
- Financial Accounting 2
- Personal Taxation
- Business Environment
- Law for Accounting

### Level 5 units

- Business Taxation

### Level 7 units

- UK Taxation for Business and Individuals - Advanced

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# An affordable programme of online study with comprehensive support

## Support at every step

IFA Direct is designed so that you can easily study around other commitments. It gives you the full support of an expert academic adviser and online materials which are available 24 hours a day, 7 days week.

## ATHE Centre network

You decide which ATHE centre you would prefer to study at. Details of the available ATHE recognised centres can be found on the IFA website at [ifa.org.uk/ifadirect](http://ifa.org.uk/ifadirect).

## Programme guidance

Your chosen centre will provide an individual 'roll-on roll-off' learning plan and will support and guide you throughout your studies. And you don't need to worry about arranging your assessment either. Your centre will do that for you and answer any questions you may have.

## Tutorial support

Throughout your study you'll receive online tutorial support from an expert academic adviser.

## Active learning

Units incorporate online lectures and resources, personalised learning plans, videos, e-books, and presentations all delivered through the centre's secure online portal.

## IFA technical resources

Access to IFA online technical resources and *Financial Accountant* magazine.

## Recognition

Receive an ATHE Ofqual regulated certificate and transferable credits on completion of each unit.

Eligibility to apply for IFA membership or, if applicable, an IFA practising certificate on successful completion of your units.

## CPD

All units count towards your annual verifiable CPD requirement.

## Ofqual regulated qualification

You can also decide to complete the full Ofqual regulated qualification.

ATHE Level 4 Extended Diploma in Accounting

ATHE Level 5 Extended Diploma in Accounting

ATHE Level 7 Extended Diploma in Accounting and Finance

## Fees

IFA Direct units represent excellent value for money.

For details please see the IFA website

[www.ifa.org.uk/ifadirect](http://www.ifa.org.uk/ifadirect)

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## Applying for IFA Direct

Find out more about your direct route to investing in your future at [ifa.org.uk/ifadirect](http://ifa.org.uk/ifadirect), call +44 (0)20 3567 5999 or email [education@ifa.org.uk](mailto:education@ifa.org.uk).

Whether you want to learn new skills, improve existing ones, or achieve IFA membership, our Education Team will recommend a route tailored specifically for you based upon your previous qualifications.

**Find out more at [ifa.org.uk/ifadirect](http://ifa.org.uk/ifadirect)**  
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## Melanie Coey AFA MITA ATA BSc tells us why she found IFA Direct a good fit with her business

### Describe your background

I have been working in the accountancy sector for 20 years. I started as an accounts clerk and worked my way up to senior accountant in a range of engineering and manufacturing companies before starting my own practice in 2015.

### Where are you based?

I am based in Lisburn in Northern Ireland.

### What type of business are you engaged in?

I am the business owner and have two members of staff - one full time and one part time. There are 300 clients on my books and my main work includes SA tax returns, financial statements, corporation tax, payroll, and VAT. I work with limited companies, sole traders and partnerships across the board including engineering, hairdressers, funeral directors, and IT.

### What do you find challenging/rewarding within the sector?

I love to serve my clients and my aim is to help and support them as much as possible. This last year has been particularly busy and my clients have leaned on me for support for information about grants and loans available to them by the Government.

### How did you hear about IFA Direct?

I heard about IFA Direct from another accountant.

### What made you want to study on the IFA Direct programme?

I wanted to study the programme as I felt the content was on point and relevant. I also wanted to keep my CPD up to date whilst learning at the same time so it was a win-win situation for me.

### Which units did you study?

I studied Level 4 Law for Accounting and Level 5 Financial Reporting.

### What did you like about the programme?

I liked that the course content was relevant to what I was working with and experiencing in my working life dealing with clients on a daily basis.

I found it very easy to use, very streamlined and I could access it on my phone. The flexibility allowed me to complete the units

quickly, all the material was at hand and I did not need to travel to lectures.

### How did you find the teaching and support?

The support was at a very high level and everything was explained in advance.

### What are your plans to use IFA Direct for the future?

I want to encourage others to join the IFA.



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## **The Institute of Financial Accountants**

Established in 1916, the Institute of Financial Accountants (IFA) is an internationally recognised professional accountancy membership body and a full member of IFAC, the global accounting standard-setter and regulator.

The IFA is part of the Institute of Public Accountants (IPA) of Australia Group, the world's largest SME-focused accountancy group, with 42,000 members and students in 80 countries.

## **ATHE**

ATHE is a global awarding organisation regulated by Ofqual and other UK and international regulators. ATHE work with over 230 centres in 50 countries to complement a strong brand presence in the UK.

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