

# How to complete your annual member return online

## Important information

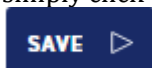
Completing your member return can be completed on-line.

Your member return has 6 steps. You will need to;

1. update your **personal details**,
2. update your **contact details**; please ensure these are updated as it is essential that we are able to contact you as your professional body
3. complete your annual **member return** (All mandatory questions are highlighted with an asterisk (\*). Guidance notes will appear in dark blue). Once you have submitted this you will not be able to re-submit
4. update your **professional interests**,
5. update your **CPD records**,
6. attach **supporting documents**; if you in practice you will be required to attach a copy of your professional indemnity insurance (PII)

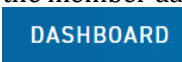
Failure to complete your return may result in you facing regulatory action.

Some information may already be pre-populated. If information is populated and is correct you can simply click the save button at the bottom of the page.



The **return** will not be populated. You will need to answer all questions and press submit at the end. Once this has been submitted you will not be able to change the answers.

If you navigate away from your member return you can click the dashboard. This will return you to the member dashboard.



## Key to symbols

\* Indicates a mandatory question.



Hover over the question mark for information on how to complete the question.

## Live Chat

Although the Live Chat window will open while you are completing this exercise, the Live Chat agents are not equipped to guide you through the annual member return process. If you find you are having difficulty, even with this guidance, please contact the membership team on +44 (0)20 3567 5999.

## Step-by-Step Instructions

### 1. Log in

Log in to your member dashboard using your designated email or member ID and your member password.

If you have forgotten your password, please contact the membership department at [membership@ifa.org.uk](mailto:membership@ifa.org.uk) or +44 (0)20 3567 5999 and they will reset this for you.

## LOGIN with your email address or IFA member/User ID

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*Password*

### 2. Member dashboard

When you log in using your member credentials and member password, you will see your member dashboard.

On the left-hand side you will see the menu of sections you need to check and complete / update in order to renew your membership.

You will need to click on each one in turn in order to complete your renewal.

Institute of Financial Accountants > Dashboard

MEMBERSHIP

PERSONAL DETAILS

CONTACT DETAILS

ANNUAL PAYMENT

MEMBER RETURN

PROFESSIONAL INTEREST

UPDATE PASSWORD

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Dashboard

Welcome to your IFA dashboard!

You can use the IFA member dashboard to complete your mandatory annual member return which includes all of the following:


- **Your annual member return** (All mandatory questions are highlighted with an asterisk (\*) Guidance notes will appear in dark blue)
- **Your CPD records**; please ensure these are updated
- **Annual payment of fees** – you should use the dashboard to make payment of your prescribed fees before the due date if you do not have a direct debit already in place.

Please note that if you are in public practice and your firm is supervised by the IFA, your firm fee and annual firm return can both be found on your separate Firm dashboard. Please use your firm number and password to access your Firm dashboard.

Please be aware that failure to pay all the prescribed fees on time may result in your membership lapsing, and if you are supervised by the IFA you may lose your firm supervision.

In addition to essential regulatory updates listed above, please review and update;

- **Your personal interest**; please ensure you opt into your chosen interests and services
- **Your personal details**; please ensure these are kept up to date
- **Your contact details**; please ensure these are kept up to date as it is essential that we are able to contact you as your professional body

IFA members hold reciprocal membership with the IPA in Australia. To access the IPA website and IPA member benefits, [click here to log on](#) 

Help

If you navigate away from this dashboard, to another part of the IFA website, you can always return by clicking "Dashboard" in the top right of your screen. If you need help with the dashboard, please [contact us](#).

### 3. Membership section

This tab contains information that is prepopulated from information previously provided by you. However, if you believe any of it is incorrect please contact the membership team for assistance.

Institute of Financial Accountants > Dashboard > Membership

**MEMBERSHIP**  
PERSONAL DETAILS  
CONTACT DETAILS  
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#### IFA Membership

IFA Member / User ID:	11993
Membership Level:	FTA AIPA
Years as Member:	15
Membership paid through to	31st December 2021

#### Membership Of Other Bodies

TO UPDATE YOUR MEMBERSHIP OF OTHER BODIES DETAILS CLICK HERE +

#### Joint membership

Where you have membership with another professional body please type the details into the joint membership box and click on the + symbol.

Complete all boxes and then save the changes.

TO UPDATE YOUR JOINT MEMBERSHIP DETAILS CLICK HERE —


Please enter your joint membership details below if you are holding the membership of another accounting body (full IFAC bodies list).

Select professional body: Association of Taxation Technician ▼


Other body name: Enter text...

\* Membership number: 7991162

\* Membership level: Member ▼

\* Membership fee paid to: 27/10/2017 

☒ I hold a practising certificate with this professional body



CLEAR

☐ I declare that the information supplied is correct and true

SAVE ►

If you do not hold membership with another professional accounting or taxation body please leave this box blank.

**Note: For the purposes of your renewal, the IPA is not considered a separate professional body as membership is provided through your IFA membership.**

## 4. Personal details tab

This tab allows you to update personal details, including any card details we may stored on the system for you. We will only have card details stored if you have chosen to renew your membership by auto-renew.

If you have not chosen to pay your annual membership fee by auto-renew this section will not appear.

If you choose to pay your annual membership fee by instalment you will be able to update the card details here, if you need to do so.

Check and update all your personal details and then click the  button.

Institute of Financial Accountants > Dashboard > Personal Details

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### Personal Details

\*Title:

Ms

\*Given Name:

Jennifer

Middle Name:

Joan

Family Name/Surname:

Keefe

\*Preferred Name:

Jennifer

Company Name:

JJK & Associates Limited t/a Jennie Keefe Tax & Accountancy

Position Title:

Director

Employment Sector:

Professional Practice

Job Responsibility:

Partner / principal / director

### Certificate Details


**NOTE:**  
Please indicate how you would like your name to appear on the membership certificate. (e.g. John David Smith)

Name on Certificate:

Jennifer Keefe

SAVE

## 5. Contact details tab

Update your contact details here and then click the  icon. If the details are already correct you can simply click the save button.

If you do not have a different business or other address please leave these boxes blank.

Institute of Financial Accountants > Dashboard > Contact Details

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Contact Details

HOME ADDRESS

BUSINESS ADDRESS

OTHER ADDRESS

+

+

+

Phone/Email

\* Please enter at least one number.

Mobile:

07775 645 907

Business:

01372 848 019

Home:

01737 901 320

Note:

Please supply at least one contact number. Where relevant, please provide the country and area code - e.g. +61 3 8665 3165.

\*Email:

cheng.ang@publicaccountants.org.au

Please let us know if you have any accessibility or dietary requirements:

?

Enter text...

☐

I have read and accept IFA's [Privacy Policy](#)

SAVE

## 6. Annual payment tab

### ANNUAL PAYMENT

When you click on the **ANNUAL PAYMENT** tab you will be re-directed to make your annual membership, and practising certificate if applicable, annual fees.

If you have already set up an active instalment, auto-renew or direct debit for your annual fees, you will see of the below message that is applicable to you. This means you will not need to take any action for your membership and practising certificates fees. You will only need to complete your member returns, and if applicable pay and complete for firm fees and firm returns.

### Instalment

Our records indicate that you have chosen to pay your fee via the instalment method. Please go to [Payment Methods](#) page to find out the scheduled dates for the payment process. If you would like to opt out of the instalment plan, please contact our office on +44 (0)20 3567 5999 or email [membership@ifa.org.uk](mailto:membership@ifa.org.uk).

Please note: If you are in public practice and are currently supervised by the IFA for AML as a firm, please make sure you have logged into both your member and firm dashboards to pay both sets of annual fees and complete both returns.

### Auto-renew

Our records indicate that you have chosen to pay your fee automatically by charging the nominated card.

Your auto-renew is due to be processed from your chosen card on the 02 January 2021. If you need to change your card details login securely to the Dashbaord and update appropriately. If your payment bounces, or we are unable to take on the agreed date, the IFA will apply late fee charges.

If you would like to choose a different method of payment, or if you have any questions regarding the renewal process, please visit the website at [Payment Methods](#) , call us on +44 (0)20 3567 5999 or email [membership@ifa.org.uk](mailto:membership@ifa.org.uk).

Please note: If you are in public practice and are currently supervised by the IFA for AML as a firm, please make sure you have logged into both your member and firm dashboards to pay both sets of annual fees and complete both returns.

### Direct debit

Our records indicate that you have chosen to pay your fee by direct debit. If you are happy to continue with this method of payment you will not need to take any further action regarding payment of this fee.

The direct debit is due to be debited from your chosen account the first week of January. If you have changed your bank account within the last 12 months please contact us to make sure we have the correct account details to take your direct debit. If your direct debit bounces, or we are unable to take this between the chosen payment dates, the IFA will apply late fee charges.

If you would like to choose a different method of payment, or if you have any questions regarding the renewal process, please visit the website at [Payment Methods](#) , call us on +44 (0)20 3567 5999 or email [membership@ifa.org.uk](mailto:membership@ifa.org.uk).

Please note: If you are in public practice and are currently supervised by the IFA for AML as a firm, please make sure you have logged into both your member and firm dashboards to pay both sets of annual fees and complete both returns.

Within this section, if you have chosen to pay your fees by instalments or auto-renew you will have the ability to adjust your card details here.

Simply click on the + symbol on the right-hand side for the ability to update your card details. Your details are stored in PayPal and not the IFA database.

## Credit Card Details

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You have chosen to pay your membership fee by either active instalment or auto-renew. In order for this facility to work, your card details are securely kept within the Stripe gateway. If your card details have since changed or expired since the last payment, please update these by entering the details below.

Your auto-renew payment will be taken during the first week in January, with your instalment payments being taken on the first working day in January and the last working day in January.

If your card details have changed in the last 12 months, please update these below. Please remember, for the auto-renew facility you will need to use a credit card.


TO UPDATE YOUR CREDIT CARD DETAILS CLICK HERE

Please ensure that your preferred mailing address matches the address on your credit card statement to avoid any delays in the authorisation process.

User ID: 237908

\*Name on Card:

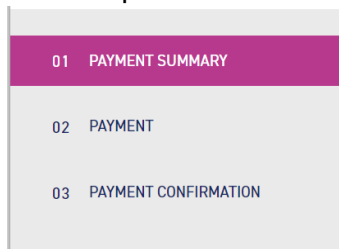
\*Credit or debit card:

**SAVE** 

Powered by **stripe**

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If you have not chosen one of these, the message then the below page will appear, outlining three steps to follow



You can choose one of the below methods of payment.

## Annual Payment

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**IFA User ID:** 237908  
**Invoice Number:** 141880

Your IFA annual fees are due. If you are in public practice and are currently supervised by the IFA for AML as a member firm, please make sure you have logged into both your member and firm dashboards to pay both sets of annual fees and complete both returns.

All fees are in British Pounds. Accepted forms of payment are VISA, MasterCard and American Express.  
If you have any questions regarding your invoice, please contact your local IFA team member on +44 (0)20 3567 5999.



## Payment Option

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**Please note:**

If you choose to pay by instalments, you will receive a tax invoice for the first payment. Details for subsequent instalment payments will be added to your tax invoice, a copy of which will be available once your annual IFA fee has been paid in full.

Set up a direct debit

☒ Full Payment   
☐ Auto-renew 

☐ Instalment Payment   
**Instalment payment method is now expired**

## Payment Summary

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## ***01 Payment summary***

In this section you are able to pay your membership fee in full, by instalment or by auto-renew.

- **Full payment:** by ticking this box and completing the payment details you will pay all outstanding membership fees in one transaction.
- **Instalment payment:** by ticking this box and completing the payment details you will pay one-third of your membership fee plus a one-off instalment set-up charge of £30.00. The second instalment will be taken on the 04 January 2020. The third instalment will be taken on the 01 February 2020. Your card details are stored in PayPal and not the IFA database.
- **Auto-renew:** by ticking this box and completing the payment details you will pay all outstanding membership fees in one transaction. This facility is only available for credit card use. The system will store your credit card details allowing you to use the same card for payment of future membership fees. Your details are stored in PayPal and not the IFA database.

The amount below will be show in full unless you choose instalments. If you choose instalments they amount will be changed to reflect three equal instalments (first payment due on the day of setting up the instalment) plus a £30.00 instalment charge.

## ***02 Payment***

In this section you have the ability to make payment. You must provide card details within this section.

## ***03 Payment confirmation***

In this section confirm the payment before submitting. Once submitted you will not be able to cancel the payment.

### **Note:**

**Once you have made payment you will need to complete the Member return (section 7) online in order to renew your membership fully.**

## 7. Member Return tab

You must answer all questions within this tab. The return consists of 5 pages.

Page 1 consists of your Public Practice Declaration. If you are in practice and are not supervised by the IFA for compliance with the Money Laundering Regulations, we shall contact you to via email to request further information.

Institute of Financial Accountants > Dashboard > Member Return

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### Member Return

0%Page 1 of 5

Last member declaration submitted on 30/11/2021

In accordance with the [IFA Bye-laws](#), members and affiliates must complete and submit an annual declaration and confirmations to the IFA as well as pay the prescribed fees by the due dates. Failure to do so may lead to regulatory or disciplinary action.

Whilst completing your member return you will be asked to confirm that the details we hold on file for you are correct, plus answering the annual public practice declaration, fit and proper declaration and CPD question.

#### Public Practice Declaration

1. Are you currently offering accountancy services to the public for reward as a sole practitioner, partner or director, or through the medium of a body corporate, other than as an employee in the United Kingdom? \*

Yes

2. Are you supervised by the IFA for compliance with the Money Laundering Regulations as an IFA member firm?

Yes

If you have answered **Yes** above, please ensure you log in and complete your firm return and pay your firm fees. Failure to complete your firm return could result in disciplinary action, whilst failure to make payment could result in your membership and supervision lapsing.

Once all returns and payments have been made the IFA will release your annual practising certificate.

3. Please confirm who your AML Supervisory body is.

Select ...

If you are not supervised by the IFA for compliance with the Money Laundering Regulations as an IFA member firm, we will contact you to obtain further information to confirm you are compliant with the IFA public practice regulations. Please attach a copy of your Professional Indemnity Insurance (PII) certificate to the supporting tabs section of your member dashboard.

Please also be aware the IFA will contact your professional body to confirm that your supervision is still valid before releasing your annual practising certificate.

If you would like to transfer your supervision to the IFA please contact the membership department on 020 3 567 5999 or email [membership@ifa.org.uk](mailto:membership@ifa.org.uk).

PREVIOUS

NEXT

Pages 2-4 consist of your fit and proper declaration.

If you select  as your answer to any of the fit and proper questions a box will appear for you to provide further details. Depending on your answer we may contact you for more information.

## Member Return

13%

Page 2 of 5

Last member declaration submitted on 30/11/2021

### Fit and Proper Declaration

#### Section A – Financial integrity and reliability

If you answer 'yes' to any of the questions below, please provide details in the comments box.

Have you, in the United Kingdom or elsewhere:

1. Been the subject of any debt or award against you that remains outstanding or was not satisfied within a reasonable period? \*

No

## Member Return

31%

Page 3 of 5

Last member declaration submitted on 30/11/2021

### Fit and Proper Declaration

#### Section B – Convictions or Civil Liabilities

If you answer 'yes' to any of the questions below, please provide details in the comments box.

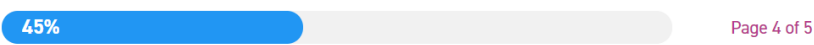
There is no need to mention offences which are spent for the purposes of the Rehabilitation of Offenders Act 1974, equivalent legislation in your country, offences committed before the age of 17 (unless committed within the last ten years) or road traffic offences that did not lead to a disqualification or prison sentence.

Have you, in the United Kingdom or elsewhere:

1. Been subject to a criminal conviction as set out in [schedule 3 of the Money Laundering Regulations 2017](#) or equivalent legislation as may apply in other jurisdictions which is unspent? \*

No

# Member Return



Last member declaration submitted on 30/11/2021

## Fit and Proper Declaration

### Section C – Good reputation and character

If you answer 'yes' to any of the questions below, please provide details in the comments box.

Have you, in the United Kingdom or elsewhere:

1. Been notified of a potential investigation or disciplinary procedures by a professional body, tax authority, law enforcement, regulator, court, tribunal or other authority? \*

No

Page 5 of the return consists of your CPD declaration and your confirmations.

## Member Return

81%

Page 5 of 5

Last member declaration submitted on 30/11/2021

### CPD Declaration

#### Members

All members must complete an annual Continuing Professional Development (CPD) declaration as part of your membership renewals process unless you meet the criteria for CPD exemption.

All members must complete a minimum of 40 hours of CPD in any year, of which 20 hours shall be verifiable, unless they are CPD exempt as defined in the CPD regulations. Click [here](#) for more information on the regulations and exemptions.

Retired and life members are required to submit an annual CPD declaration certifying compliance with IFA's CPD requirements or confirming that they are exempt from CPD

Failure to complete your CPD declaration may result in disciplinary action in accordance with IFA's [CPD regulations](#)

#### Affiliates

IFA affiliates of IFA supervised firms are exempt from the CPD requirements detailed above since they are not IFA members. However, the IFA strongly encourages affiliates of its supervised firms to undertake CPD relevant to their roles since affiliates must adhere to the Institute's Code of Ethics which includes the fundamental principle of professional competence and due care.

### CPD Confirmation

Please indicate below which statement applies to you:

1. I have complied with the IFA's CPD requirements for the previous 12 months and can provide evidence of this if requested by the IFA \*

Yes

### Confirmations

I am aware of IFA's [privacy notice](#).

I am aware that providing information to the IFA which is false or misleading in the public practice declaration, fit and proper declaration, CPD declaration and confirmation, and other sections contained in the membership dashboard, may lead to disciplinary action being taken against me by the IFA.

I am aware that the IFA reserves the right to contact me, or other relevant parties, to verify any of the information provided in the membership dashboard.

I have answered the questions in the public practice declaration, fit and proper declaration, CPD declaration and confirmation, and other sections contained in my membership dashboard truthfully and honestly, to the best of my knowledge and belief. Should any of the circumstances above change, I shall inform the IFA within 21 working days.

☐ (a) I, Jennifer Keefe, agree to adhere to the IFA's Bye-laws, Code of Ethics, regulations, [member obligations](#) and guidance. I understand that by ticking this box I am confirming that all the above information is true and correct to the best of my knowledge and belief. \*

☐ (b) I confirm that I have looked at the [personal details](#) tab within my member dashboard and confirm they are correct, or I have updated where necessary. \*

☐ (c) I confirm that I have looked at the [contact details](#) tab within my member dashboard and confirm they are correct, or I have updated where necessary. \*

< PREVIOUS

SUBMIT >

**Note: We may request to see evidence of your CPD for a certain time period, including specific training.**

Once you have clicked submit you would have done your member return for the current year. The following page will then appear

Institute of Financial Accountants > Dashboard > Member Return

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Member Return

Member Declaration saved

Thank you for completing your annual member return. Please ensure you have also done the following;

- Kept your personal details up to date
- Kept your contact details up to date; please ensure these are updated as it is essential that we are able to contact you as your professional body
- Updated your CPD records
- Paid your annual fees – you should use the dashboard to make payment of your prescribed fees before the due date if you do not already have a direct debit, instalment or auto-renew agreement in place.

Please note that if you are in public practice and your firm is supervised by the IFA, your firm fee and annual firm return can both be found on your separate Firm dashboard.

Please be aware that failure to pay all the prescribed fees on time may result in your membership, and potentially supervision, lapsing.

Additionally, failure to complete your member return may result in your facing regulatory or disciplinary action.

Please note we will contact you if we need to discuss anything within your member return.

SUBMIT >

You will not be able to go back to your member return. If you realise that there is an error on the return you will need to contact the membership team directly who will assist you.

8. Professional interest tab

You can use this tab to indicate to the IFA what your chosen method of communication is, whilst also choosing what you would like to hear from us.

Please note our chosen method of communication is email, and we will communicate with you anything that helps you meet your member obligations or that is a of a legal requirement.

Professional Interest

Yes! I would like to receive information about news, events, products, services and special offers from the IFA via:

Email ▼

Select / Deselect All

IFA Services & Offers

- ☐ Alternative Finance
- ☐ Anti- Money Laundering Compliance
- ☐ Banking
- ☐ Business Rescue & Insolvency
- ☐ Career Management
- ☒ IFA Branch Network
- ☐ IFA Conferences
- ☐ IFA CPD

CPD Interests

- ☐ Accounting
- ☐ Agriculture
- ☐ Anti-Money Laundering
- ☐ Assurance
- ☐ Auto-Enrolment
- ☐ Banking
- ☐ Bookkeeping
- ☐ Business Development

## 9. CPD records tab

As a member of a professional body you are required to undertake relevant CPD each year. You can keep details of your CPD records up to date by taking advantage of our online CPD records saving facility.

If you require any assistance with using these facilities, please contact the membership department.

### CPD Records

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Members are required to keep a record of their CPD activities and if requested, co-operate with the IFA compliance and monitoring process and provide evidence of CPD records.

All members must complete a minimum of 40 hours of CPD in any year, of which 20 hours must be verifiable, unless you are CPD exempt. Verifiable CPD shall be related to your roles, responsibilities and/or career, be support by evidence and related to specific learning outcomes. Further information on IFA's CPD requirements and CPD exemption is available [here](#).

From:

24/09/2018



To:

24/09/2020



SEARCH ►

Add CPD activity not provided by IFA

ADD CPD RECORD ►



## 10. Support documents tab

Here you will be able to attach a copy of your Professional Indemnity Insurance (PII). Failure to attach this may result in us not being able to release your new practising certificate.

### Supporting Documents

Prior to uploading your documents, please make sure your **document name** is in English (only letters and numbers are permitted). Failing to do so, your document may not be uploaded successfully.

If a **document size** is bigger than 5MB, please separate it to different files in different names.



#### Guidance

**Professional indemnity Insurance (PII):** As required in [IFA's Public Practice Regulations](#), professional indemnity Insurance (PII) cover is compulsory for members who have an IFA practising certificate and are engaged in public practice, regardless of the amount of practice income. Further information is available in our [website](#).

**Firm Risk Assessment (member firm only):** As required in the Money Laundering Regulations 2017, firms must perform a firm-wide money laundering risk assessment. Further information is available in our [website](#).

Please select the document type first, then click the upload button to locate and upload your supporting document. Repeat the action until all documents have been uploaded.

Select document type...▼



## 11. Invoices section

In this section you have the ability to view all past invoices and payments, including attendance at branch events and conferences. You can email past receipts to yourself or a third party.

You also have the ability to make full payment for any outstanding invoices that are shown. These will include not only the annual fees but also conference bookings, workshops and CPD events.

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## Invoices

If your firm is supervised by the IFA for compliance with Anti-Money Laundering regulations, you also need to pay the Firm fee on your separate Firm dashboard.

Inv. No	Inv. Date	Description	Charges	Payments	Adjust Amount	Balance	Tick to pay
147154	01/01/2021	Tax adviser membership fee for the period from 01/01/2021 through 31/12/2021	265.00	265.00	0.00	0.00	<a href="#">View...</a> <a href="#">Email...</a>
132471	01/01/2020	Tax adviser membership fee for the period from 01/01/2020 through 31/12/2020	150.00	150.00	0.00	0.00	<a href="#">View...</a> <a href="#">Email...</a>
132219	30/09/2019	Tax adviser membership fee for the period from 30/09/2019 through 31/12/2020	108.00	108.00	0.00	0.00	<a href="#">View...</a> <a href="#">Email...</a>
132194	26/09/2019	PrePay: 26/09/2019	0.00	0.00	0.00	0.00	<a href="#">View...</a> <a href="#">Email...</a>
124778	01/01/2019	Tax adviser membership fee for the period from 01/01/2019 through 31/12/2019	150.00	150.00	0.00	0.00	<a href="#">View...</a> <a href="#">Email...</a>

1

2

▶

Total Amount Payable £0

Upon payment, you will receive a confirmation email with your tax invoice(s), which details the VAT amount paid

If you complete all sections above, including making payment, you would have successfully renewed your membership, and practising certificate if applicable.

If you are supervised by the IFA for AML Supervision as an IFA member firm, you will also be required to complete your firm return. You can access this by logging into your firm dashboard and entering your firms details. If you are supervised by the IFA and do not pay your firm fee, your membership and supervision may lapse as you cannot hold membership without also holding AML supervision.

### **Assistance**

If you require any help completing your online member return or making payment please contact the membership team on +44 (0)20 3567 5999 or email [membership@ifa.org.uk](mailto:membership@ifa.org.uk)

If you require any assistance completing your firm return please contact the compliance team on 020 3567 5999 or email [compliance@ifa.org.uk](mailto:compliance@ifa.org.uk)

Institute of Financial Accountants  
CS 111, Clerkenwell Workshops  
27-31 Clerkenwell Close  
Farringdon  
London EC1R 0AT

T: +44 (0)20 3567 5999  
M: [membership@ifa.org.uk](mailto:membership@ifa.org.uk)  
[www.ifa.org.uk](http://www.ifa.org.uk)