



2015

ICBA

Institute of Certified
Bookkeepers and Accountants

A professional body for
finance practitioners

About us

The Institute of Certified Bookkeepers and Accountants (ICBA)

is a professional body for qualified finance professionals and office administrators in southern Africa. It was part of the ICB from 1931 until 2013, when regulations required that the membership and education/awarding roles be separated.

As a professional body, the ICBA awards designations for people who hold recognised, registered qualifications and relevant work experience.

The ICBA is not a training provider, nor do we conduct assessments or award qualifications.

Who

can apply for ICBA membership?

ICB graduates: If you currently hold an ICB qualification and have appropriate work experience, you will be able to register with the ICBA as a member and put those all-important letters (designations) after your name. You will also enjoy the other benefits associated with being a member of a professional body.

Financial practitioners holding ICBA-recognised qualifications from another (non-ICB) professional body or accredited tuition provider:

We welcome member applications from anyone who holds an NQF Level 3 or higher professional **financial, accounting, bookkeeping or office management** qualification, and who has relevant work experience.

People who are not yet qualified, i.e. have not yet met the requirements for full membership: You can apply to be a student member of the ICBA. You won't be able to use a designation, as those are for qualified professionals only, but you will get all the other member benefits.



At a
glance

The ICBA is a professional body for bookkeepers, accountants, office administrators and financial managers.

We recognise relevant registered qualifications and work experience.

Criteria

for membership:

Qualifications: Qualified ICBA members must hold an NQF Level 3 or higher professional qualification in **finance, accounting, bookkeeping or office management** (subject to approval by the ICBA).

Work experience: Qualified members must have a specific amount of **relevant and current** work experience. When applying, submit a detailed CV outlining your work experience. The ICBA will assess this when considering you for membership. See **ICBA membership levels** on page 6.

Continuing Professional Development: To retain your membership, you will need to show that you have maintained your knowledge and skills relating to your professional life. Many of the learning sessions on offer for our members will earn you CPD points. (See the News and Events section on our website.) All ICBA members must complete **at least 20 hours of CPD every year** (at least eight of these hours must be verifiable). Visit our website for our CPD policy and procedures.

Annual membership fee: This must be paid in January so that you can continue to use your ICBA designation and receive member benefits.

How

to apply for ICBA membership

You will need to send us:

- **Your completed ICBA Membership Application** form (download this from www.icba.org.za/apply-now)
- A certified copy of your **qualification results** (to verify the subjects you've completed)
- A certified copy of your **qualification certificates, diplomas or degrees**
- Your detailed, current **Curriculum Vitae**
- **Payment** for your application (see page 8). You are welcome to apply for ICBA membership anytime during the year. Note however that ICBA membership runs according to the calendar year, so it's best to get your application in before the New Year to get the most of your membership. The ICBA Admissions Board will assess all membership applications and will award levels of membership based on your **highest qualification and relevant work experience.**

We award designations to people who meet our membership requirements and have paid the applicable fees.

The ICBA provides a range of benefits to members.

Paid-up members may use the ICBA logo to show their professional affiliation.

We promote the professionalism and reputation of our field.



Benefits for members

- **A designation:** Place those all-important ICBA letters after your name (except for student members).
- An ICBA **annual membership** certificate.
- Our **FREE tax booklet**, issued after the annual Budget Speech (while stocks last) to keep you up to date about tax changes and information on the Budget.

- A **FREE ICBA Member's Notebook**.
- Get **50% off membership** through the South African Institute of Tax Practitioners (SAIT - www.thesait.org.za). If you qualify to become a **tax practitioner**, you'll need to meet these criteria:
 - Hold the National Diploma: Technical Financial Accounting (NQF Level 5) qualification or higher awarded by the ICB; and
 - Meet SAIT's other membership criteria, including work experience.
- **Become an Accounting Officer** through the Southern African Institute of Business Accountants (SAIBA - www.saiba.org.za) when you meet these criteria:
 - Hold the National Diploma: Financial Accounting (NQF Level 6) qualification awarded by the ICB; and
 - Meet SAIBA's other membership criteria, including work experience.
- Access to **workshops and seminars** which can earn you CPD points (see www.icba.org.za/category/events).

- Ask Betty Bookkeeper any work-related questions - she's your **personal technical helpdesk!**
- Certified Technical Financial Accountants and Certified Financial Accountants may perform the duties of an ex-officio **Commissioner of Oaths** (see guide on the ICBA website for details).
- ICBA members who are bookkeepers in private practice can apply for exclusive access to **Pastel's Bookkeepers' Forum** which entitles you to a software welcome pack, priority telephone support, invitations to Pastel seminars, and much more for an annual fee.

Contact Pastel on 011 304 3550 or channel@pastel.co.za and quote your ICBA membership number.

- **ICBA members in good standing may use the ICBA logo** in their email footers, business cards, etc. to show their affiliation to our professional body. See our website for details.

Why join a professional body like the ICBA?

Improve your credibility. Being a member of a professional body shows that you take your career seriously. It reassures employers and clients that you are committed to your professional development and are part of a respected community.

Place letters after your name (not applicable to student members). When you apply to join the ICBA, we assess your qualifications and work experience. If these meet our criteria, and you pay our annual membership fee, we will certify you as an ICBA member at the highest applicable level. Student members do not get a designation, but all qualified members will be able to place their designation after their names, for as long as their membership is current. All members (including students) will receive a membership certificate that is valid until the end of the calendar year (December 31st).

Get a whole range of benefits. The ICBA offers its members a range of benefits that help them in their careers. We are also constantly working to improve the credibility and image of our industry, which in turn benefits our professional community. See page 4 for a detailed list of our current member benefits.

Keep your knowledge current. In most professions, practitioners have to spend a certain amount of time every year learning about new developments in their sectors. You wouldn't be happy with a doctor or pilot who'd let his or her knowledge lapse, would you? It's just as important that financial industry practitioners keep their skills current, through Continuing Professional Development.

One of the main reasons to become a member of a professional body like the ICBA is that it shows you are committed to keeping your knowledge up to date. We not only send you a monthly newsletter, but also let you know about workshops and seminars – which can earn you CPD points.



ICBA membership levels

As an ICBA member, you can apply to upgrade your designation as you achieve new qualifications together with relevant work experience. The ICBA recognises NQF-registered qualifications in bookkeeping, accounting, office and financial management.

Should you wish to upgrade your membership level based on qualifications and/or work experience, please apply in writing and submit the qualification and work experience together with the membership upgrade fee.

Membership	Designation	NQF level attained	Minimum work experience*
Student	None	Not applicable	0 months
Certified Junior Bookkeeper	CJB/cba (SA)	Level 3	6 months
Certified Public Accounts Administrator	CPAA/cba (SA)	Level 4	12 months
Certified Senior Bookkeeper	CSB/cba (SA)	Level 4	12 months
Certified Small Business Financial Manager	CSBFMI/cba (SA)	Level 4	12 months
Certified Technical Financial Accountant	CTFA/cba (SA)	Level 5	24 months
Certified Technical Public Accountant	CTPA/cba (SA)	Level 5	24 months
Certified Junior Office Administrator	CJOA/cba (SA)	Level 5	24 months
Certified Senior Office Administrator	CSOA/cba (SA)	Level 5	24 months
Certified Financial Accountant	CFA/cba (SA)	Level 6	36 months
Certified Office Manager	COM/cba (SA)	Level 6	36 months

*Relevant and current work experience

Frequently-asked questions

What happens if I forget to send through some information when I'm applying for membership?

Send it through to us ASAP. We will also let you know if there is anything missing from your application. Please see page 3 for a list of what's required. Your application will not be reviewed until all documents have been received.

Will I get my application administration fee back if you don't accept me as a member?

No – fees are not refundable as we will have incurred time and costs in assessing your application.

I have a lot of relevant work experience but don't have a qualification. Can I still apply for ICBA membership?

ICBA membership is based on both academic knowledge (as demonstrated by a qualification) and practical experience. If you don't meet our academic requirements, you will not be granted qualified membership status, but we may offer you student membership.

I have a foreign qualification. What do I need to do?

Please contact the South African Qualifications Authority (SAQA) and ask them to evaluate your foreign qualification. Then submit a copy of their evaluation with your ICBA membership application.

What happens if I have paid my ICBA fees into the ICB's bank account by mistake?

Your application and/or membership renewal will be delayed until the two organisations can arrange for the fees to be cross-allocated and to complete the process.

What qualification(s) must I have to be considered for ICBA membership?

Your professional qualification(s) must be registered on the National Qualifications Framework (NQF), e.g. Further Education and Training Certificate: Bookkeeping, or be recognised as Higher Education Qualifications, e.g. the National Diploma: Financial Accounting (NQF Level 6) or a Bachelor of Commerce degree. They need to be relevant to the finance and office management/administration fields – e.g. you might hold a BComm degree but if you did not do accounting or other financial subjects, we may reject your application as a qualified member. Remember that you must have relevant work experience too.

Why do we need to do CPD and what is the difference between verifiable and non-verifiable CPD points?

Continuing Professional Development obligations are common in many professions. CPD is a structured approach to learning which helps make sure members are competent to practice their profession, and that their knowledge is current. CPD can involve any relevant learning activity: formal and structured (verifiable) or informal and self-directed (non-verifiable) - and these can be theoretical or practical. Verifiable means you have to prove you earned those points. You can do this by providing an attendance or completion certificate from a course. Non-verifiable points are points you simply log (e.g. half an hour to read our newsletter) but do not need to provide evidence of.

How much does ICBA membership cost?

	Regular fees	Discounted fees for registered ICB learners
Application administration fee* (includes first year membership fee)	R 620	R 300
Annual membership renewal – all qualified members	R 500	R 180
Annual membership renewal – students (excludes use of designations)	R 430	R 110
Membership upgrade administration fee for existing members	R 150	
Membership certificate re-print	R 200	

**Please note that this fee is not refundable, regardless of the outcome of your application.*



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www.icba.org.za | enquiries@icba.org.za | Tel: +27 21 659 1310

ICBA, PO Box 1178, Cape Town, 8000, South Africa



Special offer

Registered ICB learners qualify for discounted fees when applying for and retaining ICBA membership. This is a special offer for 2014 and 2015 only.



Bank details for payment:

The Institute of Certified Bookkeepers and Accountants NPC, First National Bank – Rondebosch branch, bank code: 201509, account number: 6243 9833 204. SWIFT code: FIRNZAJJ.

Please attach proof of payment to your ICBA Membership Application Form, which you can download at www.icba.org.za/apply-now.