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Accredited Funds Professional designation application form

Section 1: Personal Details

Please supply us with your up-to-date contact details in the spaces provided for below. Please note if your contact details change it is your responsibility to update them on IOB Learn (iob.ie) under 'Member Resources | My Details'.

Personal details

Membership number

First name

Surname

Date of Birth / /

Contact email*

Mobile*

Work details

Employer Name

Department

Staff number

Contact details

Address

***Note:** Future correspondence will be in electronic format via IOB Learn on IOB's website iob.ie. You will be alerted by email and SMS when new correspondence is posted to the Correspondence Section in IOB Learn. Please ensure your current email and mobile details are up to date. Postal correspondence e.g. parchments may be sent to the contact address you specify above.

CPD requirement

Your annual CPD requirement of 10 hours will commence in the year following qualification as set out in the guidelines and regulations (available at iob.ie/cpdrules). 5 hours must be Specialist Content* and 1 hour relevant to Ethics.

*Specialist Content is content provided by IOB via online eCPD Modules and IOB events..



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Section 2: Designation Criteria

Please tick one of the following

<p>I have successfully completed :one of the following qualifications: Professional Certificate in International Investment Fund Services Or Professional Certificate for Designated Persons in a Fund Management Company (you do not need to complete Section 3 Declaration of Work Experience).</p>	
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OR

<p>Work Experience</p> <p>I have at least four years' minimum relevant work experience in the funds industry (please complete Section 3 Declaration of Work Experience) which meet the Professional Certificate in International Investment Fund Services programme competencies set out below:</p> <ul style="list-style-type: none">• Demonstrate an understanding of the legal and regulatory framework for the funds industry.• Explain the different fund structures; investment strategies and the portfolio instruments involved in these; and the documents required in order to establish a fund.• Explain the roles of the various parties involved in a fund.• Explain the various risks involved in running a fund, including risks involved in delegation / outsourcing.• Demonstrate the importance of a correct NAV calculation, the inputs required and the impact of an incorrect NAV to all stakeholders.	
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OR

<p>I have completed the Financial Services elective as part of the Final Admitting Exams to Chartered Accountants (please provide evidence of qualification with your application. You do not need to complete Section 3 Declaration of Work Experience).</p>	
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Section 3: Declaration of Work Experience

Employer	Position	Start date	End date
Description of duties – Please outline the nature of your main duties in this role			

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Description of duties – Please outline the nature of your main duties in this role			

I hereby confirm the above-named employee’s attainment of the programme competencies through industry work experience as outlined above:

Employer Name* (BLOCK CAPITALS)	<input type="text"/>	Position (BLOCK CAPITALS)	<input type="text"/>
Employer Signature*	<input type="text"/>	Date	<input type="text"/>

Please note that you must meet the experience requirement in order to be eligible to apply for the designation. If you do not have the experience your application cannot be processed at this time. Please note a random audit of experience requirement will be carried out.



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Annual membership and CPD fees

IOB's annual membership fee of €110 (if not already paid) and the Accredited Funds Professional designation fee of €115* is due with this application form. These fees are annual fees and will be due again next January.

**If your application is following qualification from the August – December exam board your €115 Designation fee will be payable next January*

Payment:

If the fee(s) are being covered by your employer under an agreed *Fee Payment Facility** we will invoice your employer for the relevant fee(s). Otherwise please complete the payment details form ([link here](#)) and return for processing. If you do not wish to provide card details, we will contact you for payment when processing your form.

** Some corporate members have an arrangement to pay the annual fee(s) on your behalf, directly to IOB by group invoice, please check with your HR/training department to check if they have a Fee Payment Facility in place.*

Data Protection

For more information about how we use your personal information, the types of information we collect and process and the purposes for which we process personal information, please read our Data Protection Notice ([available here](#))

The General Data Protection Regulation impose obligations on IOB to keep personal data up to date. To help us comply with this obligation, you can update your personal information at any time via "Member Resources > My Details" section on IOB Learn (where you may also update your marketing preferences).

Annual requirements to maintain your designation

In the year following qualification you will be required to complete and/or log CPD hours in the CPD section of IOB Learn.

- 10 CPD hours must be completed by 31st December each year
- At least 1 hour must be relevant to Ethics
- At least 5 hours must be AFP specialist content (ie content provided by IOB via online eCPD Modules and IOB events)
- You are required to submit an Annual Return online each year before 31st January. An annual return is a declaration confirming the CPD hours you have completed in the previous year up to 31st December.
- IOB provide eCPD modules which are available on demand on IOB Learn. We also provide a large range of free live online events to help you meet your CPD hour requirements. You will receive notifications when the live events are available to register for. You can also look for them on our website www.iob.ie
- Annual IOB Membership and Designation fees must be paid up to date



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Additional products and services

From time-to-time, IOB would like to keep you updated about products and services which we will offer by email, post, SMS and other electronic means.

If you would prefer not to receive these updates, please tick the relevant box(es) below:

Membership (e.g. Member Events, Quarterly Newsletter, Career Portal)	<input type="checkbox"/>	Tick if you do NOT want to receive Membership updates
Education (e.g. New and Existing Programmes, Open Evenings, Programme Taster Lectures, Masterclasses)	<input type="checkbox"/>	Tick if you do NOT want to receive Education updates
Designation/Continuing Professional Development (CPD) (e.g. CPD Webinars, CPD Competitions)	<input type="checkbox"/>	Tick if you do NOT want to receive CPD updates

If you have previously opted out of receiving updates on additional products and services and now wish to receive updates, please manage your preferences under "Member Resources | My Details" at iob.ie

Employee Funding / Privacy

If you are taking part in this CPD scheme in a private capacity (i.e., outside the course of your employment) and you do **not** want IOB to invoice your employer for fees and do **not** want IOB to disclose your designation status to your employer, please tick the box below:

I can confirm that I do not want IOB to invoice my employer as I am participating in this CPD scheme outside the course of my employment and funding the initial and subsequent annual designation fees myself.	<input type="checkbox"/>
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However, if your employer subsequently seeks such information in relation to you and submits evidence to us that you took part within the course of your employment, we reserve the right to disclose your information to your employer.

If you wish to change this preference in the future, please contact info@iob.ie

Declaration

I wish to apply for Accredited Funds Professional Designation and CPD membership.

I have read in full, understand and agree to be bound by the terms and conditions for designation as an Accredited Funds Professional set out and referred to online at iob.ie/cpdrules and iob.ie/terms

Signature _____

Date / /

Please return the completed form as soon as possible to cpdapplications@iob.ie