

# Financial Controllership Programme



*Following the successful pilot run in 2016, the Hong Kong Institute of Certified Public Accountants officially launched the new Financial Controllership Programme in 2017. It is a unique, tailor-made, practical training programme providing participants with insights into the work involved as a financial controller who adds value to the employer's business.*

*All preparatory and contact hours will qualify as verifiable CPD hours for Institute's members.*



## Programme objective

The objective of the programme is to develop competencies expected of a skilled financial controller, providing participants with:

- The core technical knowledge and skills expected of a financial controller
- Insights into the work involved as a financial controller and how to add value to the business



## For whom is the FCP designed?

- Aspiring and recently appointed financial controllers
- Existing financial controllers who wish to refresh their skills
- Individuals preparing to move from practice into business





## Structure and learning outcomes

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The FCP combines face-to-face learning, experience sharing and case studies for interactive participation. The FCP has 5 modules constituting a 16-day programme. Classes are run on Saturdays (or Sundays), 9:30 am to 5:30 pm.



### Management Competency Development

4 days

The importance of soft skills has always been highlighted as the differentiator for career development for accountants today. Stepping up to financial controller, CFO and managing director does not only require you to be a better accountant, it also requires you to be able to lead, communicate, influence, negotiate and partner with key stakeholders.

This module will challenge you, help you identify your personal strengths and weaknesses and give you practical steps you can take in your present situation to become a better leader and manager. The module will feature best practices, experience sharing, role play and exercises. Sessions will focus on live issues faced by participants.



### Accounting for Performance and Decision Making

3 days

This module aims to recognize and develop the role of the financial controller in supporting the strategic decision making process through the provision and impactful communication of relevant information drawing on financial and non-financial decision making techniques, key performance measures and insightful reporting.

Participants will be able to develop skills and a commercial mindset, which are a necessary precondition to preparing for a successful career in business finance.



### Strategic Finance

3 days

This module aims to enhance the technical skills and practical knowledge required of a financial controller in strategic finance, including capital planning, bank financing, treasury and risk management, debt capital market and hedging products, fintech, equity capital market and mergers and acquisitions.

The module will focus on applications and case studies, including end to end problem solving from building a framework to evaluating alternatives and implementation issues. The sessions will involve corporate and investment bankers, treasurers and CFOs.



### Risk Management and Corporate Governance

4 days

This module explores the practical issues of corporate governance and risk management in a company. Through content and case study, participants will be able to gain the understanding and experience to recognize the problems and difficulties of applying the best practice, and judgments and decisions that company leaders and managers will have to make while facing a variety of situations and contexts.

Participants will also gain the advanced skills and confidence to meet the increasing corporate and risk management demands, thus increasing their overall value to the business.



### Business Ethics

2 days

This module will highlight the important role of the financial controller in setting the culture and code of ethics in a business.

Participants will be able to learn about the fundamental concepts and requirements in Hong Kong, mainland China and other major jurisdictions. They will be equipped with practical strategies to eliminate or at least to reduce the business integrity risks that may surface within their business organizations. They will also be empowered with the necessary skills to instill ethical values and practices in their finance team and where possible in the whole organization.



## Teaching professionals

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Course directors and facilitators are industry experts and experienced professional accountants in business with expertise in different subject areas covered by the programme.



## Admission requirements

Individuals who have obtained at least 5 years of post-CPA qualification work experience are eligible for admission to the programme.

Practical experience is highly desirable for participants to benefit fully from the programme. As places are limited, preference will be given to applicants with practical experience in financial controllership.



## Award

Participants will be awarded a certificate by the Hong Kong Institute of Certified Public Accountants upon successful completion of the whole programme, achieving at least 80% attendance and having satisfactorily completed programme assignments.



## Recognition by CIMA (Chartered Institute of Management Accountants)

CIMA offers additional examination paper exemption to HKICPA members who have successfully completed the FCP. FCP graduates will only need to pass CIMA/CGMA's final Strategic Case Study Exam and meet practical experience requirements to obtain CIMA membership and CGMA designation.



## Programme fee

HK\$32,000/HKICPA member or HK\$44,800/non-member

Individuals may also enrol on standalone module(s), however priority will be given to those enrolling on the entire programme.



## FCP graduates

FCP graduates have come from major local and multi-national organisations. These include amongst others:

- Cathay Pacific Airways Limited
- CLP Holdings Limited
- DBS Bank (Hong Kong) Limited
- Gammon Construction Limited
- The Hongkong and Shanghai Banking Corporation Limited
- Jardine Matheson Limited
- Orient Overseas Container Line Limited
- Swire Pacific Limited
- West Kowloon Cultural District Authority



## Testimonials

“ Good to meet many experts and classmates, and learn from their practical experience as Financial Controllers. ”

“ Very practical course with real life examples and experience sharing, with theories embedded. ”

“ Being encouraged to be a passionate leader. ”

“ Apart from enhancing your potential from the structured and practical programme, you will also be inspired by the resourceful Course Directors, facilitators and guest speakers. ”



**Mr. Peter Nixon**

*Founder & Managing Director of Potential Dialogue Institute*

Peter is a fellow of the HKICPA with over 20 years' experience training, coaching and consulting thousands of professionals in over 600 private and public sector organisations in some 60 countries around the world. He specializes in decision processes especially as regards leadership, management, negotiation, conflict resolution and business development. Prior to this he was an auditor for PwC (C&L) in Montreal, Geneva and Hong Kong. Peter has authored books including: *Dialogue Gap*, *Negotiation: Mastering Business in Asia*, *The Business Developer's Playbook*, *We're F\*cked*, and *Change Manager's Casebook*.



**Dr. Aidan Goddard**

*CFO & Vice GM, Kaercher Investment (China) Co. Ltd.*

In this role based in Suzhou, Aidan is responsible for finance, M&A, IT, HR and business development across manufacturing, supply chain, sales and distribution activities. Prior to this he acted as Senior Vice President Finance with the Gibson Group where he worked on a company restructuring program.

From 2010 to 2017 Aidan was with the Hong Kong listed L'Occitane Group as CFO & COO for the Asia Pacific region with responsibility for finance, supply chain, IT, human resources, commercial and risk & legal issues.

He completed undergraduate studies in marketing followed by an MBA, LLM and PhD. He is a Fellow and Council member of the Chartered Institute of Management Accountants and has held diverse senior financial and commercial roles in the U.K., Germany, Switzerland, Australia, Hong Kong and Shanghai. His experience spans a range of industries from ranging from manufacturing to media, services, venture capital and retail.



**Ms. Gloria Yung**

*Head of Banking and Investor Relations, China Zhengtong Auto Services Holdings Ltd.*

Gloria joined China Zhengtong Auto Group in 2019 to head up the banking and investor relations management functions of the Group's two Hong Kong public listing companies. Prior to this, Gloria has been in corporate and investment banking for over 20 years, most recently with Deutsche Bank, China Minsheng Bank and JP Morgan. Gloria was also a treasury and cash management banking specialist in her earlier years with JP Morgan Chase and HSBC. Gloria holds an MSc in Accounting from Monash University and BBA Finance from Hong Kong Baptist University. Gloria is a fellow of the HKICPA and member of CPA Australia.



**Mr. Dennis Fullgrabe**

*Formerly Chief Internal Auditor of Hospital Authority*

As Chief Internal Auditor of Hospital Authority for 18 years from 1995 until 2013, Dennis has extensive experience in governance, risk management and control and led the introduction of enterprise risk management in the Hospital Authority. Dennis is currently working at the University of Hong Kong assisting in setting up governance structures and enterprise risk management arrangements in a new acute hospital in Hong Kong.



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# Financial Controllershship Programme



The Financial Controllershship Programme (FCP) combines face-to-face learning, experience sharing and case studies for interactive participation. There are 5 modules, each lasting for 2 to 4 days with classes to be run on Saturdays, constituting a 16-day programme. The schedule of the upcoming cohort is as follows:

FCP (all modules)	Day 1	Day 2	Day 3	Day 4
	9:30 a.m. – 5:30 p.m. (including 1-hour lunch)			
<b>Management Competency Development</b>	22-May-21 (Sat)	29-May-21 (Sat)	5-Jun-21 (Sat)	12-Jun-21 (Sat)
<b>Accounting for Performance and Decision Making</b>	10-Jul-21 (Sat)	17-Jul-21 (Sat)	24-Jul-21 (Sat)	
<b>Risk Management and Corporate Governance</b>	21-Aug-21 (Sat)	28-Aug-21 (Sat)	11-Sep-21 (Sat)	18-Sep-21 (Sat)
<b>Strategic Finance</b>	9-Oct-21 (Sat)	16-Oct-21 (Sat)	30-Oct-21 (Sat)	
<b>Business Ethics</b>	20-Nov-21 (Sat)	27-Nov-21 (Sat)		

Enrol now		Enquiries: 2287-7464
Programme:	Financial Controllershship Programme	
Venue:	HKICPA training center and other training venues	
Medium of instruction:	English and Cantonese	
Teaching professionals:	Experienced facilitators will share with participants their expertise and insights in different subject areas.	
Target participants:	Interested parties with at least 5 years of post-CPA qualification work experience. Practical experience is highly desirable for participants to benefit fully from the FCP.	
Fees and deadline:	Fees and enrolment deadline for <b>single modules</b> , please refer to <u>Section 3</u> on page 2.	
Enrolment procedures:	Enrolment application by ✓ online enrolment ✓ e-mail: <a href="mailto:fcpc@hkicpa.org.hk">fcpc@hkicpa.org.hk</a> ✓ post	
Award:	FCP certificates will be awarded only to those participants who have successfully completed the whole programme (i.e. 5 modules), having achieved at least 80% attendance of all modules and satisfactorily completed a programme assignment.	
Recognition by CIMA:	HKICPA members will only need to pass CIMA/CGMA's final Strategic Case Study Exam and meet practical experience requirements to obtain CIMA membership and CGMA designation.	
Points to note:	<ul style="list-style-type: none"> <li>• Cancellation is not allowed once an enrolment application is successfully processed.</li> <li>• Enrolment may be subject to selection criteria. All enrolment applications are subject to the Institute's final approval.</li> <li>• No unauthorized audio or video recording is allowed in the programme. HKICPA will record the programme solely for internal use. Selected images or videos taken from the recording may be used in future promotion of the FCP</li> <li>• Sessions will be postponed if Typhoon Signal No.8 or above or a Black Rainstorm Warning is hoisted within two hours before the commencement time. Participants will later be notified details of the substitute session.</li> </ul>	



*The course was designed and intended as a face-to-face training course.  
The Institute reserves the right to run all or parts of the course in online e-learning mode  
in view of the coronavirus epidemic or any other unforeseen circumstances.*

# Enrolment Application

We welcome enrolment application by  online enrolment  e-mail: [fcpc@hkicpa.org.hk](mailto:fcpc@hkicpa.org.hk)  post. If sending in the enrolment application by post, please send together with the required payment to HKICPA, 27/F, Wu Chung House, 213 Queen's Road East, Wanchai, HK. Re: FCP Application (E&T Dept)

## SECTION 1 – PERSONAL PARTICULARS (please complete this section in BLOCK LETTERS)

Name\*:  Mr.  Ms. \_\_\_\_\_ Name\*: \_\_\_\_\_  
(in English) (e.g. name as shown on your HKID/passport) (English Name) (in Chinese)

HKICPA Membership No.: (if applicable) \_\_\_\_\_ Mobile: \_\_\_\_\_ E-mail: \_\_\_\_\_  
 Position: \_\_\_\_\_ Organization: \_\_\_\_\_

\* Your contact details, English and Chinese names as registered in the Institute's membership records will be used in the programme and on the certificate (if applicable). Please contact the Institute for any change of particulars.

## SECTION 2 – QUALIFICATIONS AND EXPERIENCE

- Highest academic qualification: \_\_\_\_\_
- Other professional qualifications: \_\_\_\_\_  
(if any)
- Post-CPA qualification work experience (no. of years): \_\_\_\_\_
- Length of full time experience from commercial sector: \_\_\_\_\_
- Details about your **most recent** (i) & (ii) full time experience gained in the commercial sector:

### 5(i) Position held:

- Size of organization (no. of ppl): \_\_\_\_\_
- Industry: \_\_\_\_\_
- Nature of work: \_\_\_\_\_
- Period (from mm/yy to mm/yy): \_\_\_\_\_

### 5(ii) Position held:

- Size of organization (no. of ppl): \_\_\_\_\_
- Industry: \_\_\_\_\_
- Nature of work: \_\_\_\_\_
- Period (from mm/yy to mm/yy): \_\_\_\_\_

<p>5(i) Position held:</p> <ul style="list-style-type: none"> <li>• Size of organization (no. of ppl): _____</li> <li>• Industry: _____</li> <li>• Nature of work: _____</li> <li>• Period (from mm/yy to mm/yy): _____</li> </ul> <p>5(ii) Position held:</p> <ul style="list-style-type: none"> <li>• Size of organization (no. of ppl): _____</li> <li>• Industry: _____</li> <li>• Nature of work: _____</li> <li>• Period (from mm/yy to mm/yy): _____</li> </ul>	
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## SECTION 3 – FEES & PAYMENT (please where appropriate)

<b>Fees:</b>	Management Competency Development (4-day, May – June 2021) <b>enrolment by May 12</b> Accounting for Performance and Decision Making (3-day, July 2021) <b>enrolment by Jun 30</b> Risk Management and Corporate Governance (4-day, August – Sept 2021) <b>enrolment by Aug 12</b> Strategic Finance (3-day, October 2021) <b>enrolment by Sep 29</b> Business Ethics (2-day, November 2021) <b>enrolment by Nov 11</b>	<input type="checkbox"/> Member: \$8,500; <input type="checkbox"/> Non-member: \$ 11,800 <input type="checkbox"/> Member: \$6,500; <input type="checkbox"/> Non-member: \$ 9,000 <input type="checkbox"/> Member: \$8,500; <input type="checkbox"/> Non-member: \$ 11,800 <input type="checkbox"/> Member: \$6,500; <input type="checkbox"/> Non-member: \$ 9,000 <input type="checkbox"/> Member: \$4,500; <input type="checkbox"/> Non-member: \$ 6,300
<input type="checkbox"/> Cheque (No. _____) payable to "HKICPA" or "Hong Kong Institute of Certified Public Accountants"		
<input type="checkbox"/> BOC HKICPA VISA <input type="checkbox"/> BOC HKICPA UnionPay card <input type="checkbox"/> Other VISA / MasterCard		
Card Number:		Card Expiry Date (MM/YY):
Cardholder's Name: <small>(BLOCK LETTERS)</small>	Cardholder's Signature:	Date:
<b>FOR OFFICE USE</b>	Auth. code no.	Handled by
		Date

- Cash will not be accepted. Fees paid are non-refundable and non-transferable. A refund will only be made if the application is not accepted.
- Applications will not be processed if post-dated or dishonoured cheques are received.
- Any bank charges and/or expenses incurred as a result of unsuccessful credit card payments or dishonoured cheques shall be borne by the applicant.

## SECTION 4 – POINTS TO NOTE

- Personal Data:** Your personal data collected from the enrolment process and administration of courses/events/activities will be used for the purpose of the administration of the course on which you are enrolled. Such data collected may be accessible by the Institute's officers, persons or committees processing the application and related matters. In addition, the Institute may use the collected data for statistical research and analysis. The Institute intends to use the personal data of your name, email address and correspondence address to inform you, where relevant, of members' benefits, goods, services, facilities and events organized or provided by the Institute or other organizations. Members and registered students may opt out of receiving such materials at any time by logging in via the following link <https://mas.hkicpa.org.hk/mycpa/communication/preference>. Non-members may opt out of receiving such materials at any time by sending an email to the Institute at [privacyofficer@hkicpa.org.hk](mailto:privacyofficer@hkicpa.org.hk) or a letter to the Institute's privacy officer. For more information about the privacy policy of the Institute, please go to <https://www.hkicpa.org.hk/en/Tools/Privacy-policy>.
- HKICPA reserves the right to cancel part/all of the programme, or change the dates, time, venues, contents and/or teachers due to unforeseen circumstances.
- The Institute reserves the right to amend the above terms and conditions without prior notice. In case of any disputes, the Institute reserves the right to make the final decision.

## SECTION 5 – DECLARATION

I confirm that I have read and fully understood all the terms and conditions as set out in this form. I declare that the information given in this form is true and correct to the best of my knowledge and belief. If I am subsequently found to have provided false information, I agree to have my enrolment terminated without refund.

Signature

Date

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DD MM YYYY