

CIMA 会员申请说明：

CIMA 会员类型：

1. 标准会员（ACMA）：满足 3 年以上的核心层面工作经历
2. 资深会员（FCMA）：满足 6 年以上的战略层面工作经历

会员申请前提条件：

- 申请 ACMA：申请人必须完成CIMA 全科考试，并有至少3 年以上工作经验，且3 年工作经验中涵盖至少 18 个月的核心层面工作内容，此类学员可以申请CIMA 会员资质。
- 申请 FCMA：申请人必须完成CIMA 全科考试，并有至少6 年以上工作经验，且6 年工作经验中涵盖至少 18 个月的核心层面工作内容+36 个月战略层面工作内容，此类学员可以申请CIMA 会员资质。

申请获批后，您将获得Associate CIMA Member – ACMA 或 FCMA 头衔(CIMA 普通会员资质或资深会员资质)& CGMA 头衔（全球特许管理会计师）

TOPCFO 学员申请会员类型：

1. CIMA 会员申请类型：

TOPCFO 学员必须直接按照资深会员申请标准进行会员申请

完成所有考试的CIMA 考试的TOPCFO 学员需要按照资深会员要求，直接申请FCMA（CIMA 资深会员）

请注意：

若会员评审委员会最终评定您的书面材料只满足ACMA (CIMA 普通会员资质)，您可能只会授予ACMA 资质。

2. 申请材料提交方式： 所有材料可以提交电子版及清楚的扫描版，[发送至 Members.China@aicpa-cima.com](mailto:Members.China@aicpa-cima.com)进行 预审

- Section 1 – Application Form (with Signature)
- Section 2 – Full CV
- Section 3 – Two Reference Letters (with Signature)
- Section 4 – Organization Charts(with Signature)

3. 申请周期：

申请材料CIMA 会员评审委员会审核通过后，预计8 周左右，您将会收到CIMA 英国 发送FCMA 会员及CGMA 会员的确认邮件通知。

4. 申请阶段

- 发送到members.china@aicpa-cima.com，由中国会员部帮助大家进行材料预审，基本7个工作日内给予反馈意见（**高峰期10个工作日内**）通过中国会员部审核后，会发送到英国会员申请team进行复审，基本6-8周内给予回复（**每年8/9/10月份高峰期提交材料，至少需要8周时间**）。需要修改会退回给中国会员部，将由会员部工作人员与您联系；若无需修改，则最终交到评审委员会。
若材料交到评审委员会，会收到英国的确认邮件，表示材料会进行最终 assessment，无需进行修改。评审委员会阶段预计4周左右会给予最终会员评定，将会受到会员获批邮件。

5. CIMA 会员申请费用说明：

2020年标准会员申请费为165英镑，2020年资深会员申请费为260英镑，获批成为会员后需要支付一笔会员年费差价，具体金额请根据My Cima中账户显示金额为准。

会员申请费都可以进入www.cimaglobal.com，进入您的CIMA账号，用双币种VISA进行在线支付。（建议使用Google浏览器或者Firefox浏览器或手机端进行支付操作）

6. 会员证书：

在您收到CIMA 英国发送的会员确认邮件通知后，**预计1-2个月左右**，CIMA 中国总部会收到英国寄过来的证书，并通知大家缴清费用并且提供相关邮寄信息。

7. T4 考试有效期：

T4 考试成绩具有**4年有效期**，

- 若4年内未完成会员申请，您需要每年缴纳CIMA 学生年费，以保证active的状态，
- 若4年期限过期还未申请会员，即使您的CIMA 账号费用缴清，也需要重新支付当年reactive 费用。

CIMA 一般会员申请材料包括 4 份材料

(适合因个人问题无法提供推荐信或者架构图，可直接申请一般会员)

1) 会员信息（如下图显示）

Page 1: Personal Detail

CFO Route 2019

Personal details

Contact ID:

- First Name:
- Middle Name:
- Last Name:
- Date of Birth:
- Address:
- Telephone:
- Email:



按照要求填入以上信息，CIMA ID 是以 1-XXXXX(数字和大写英文字母组成的)。

Declaration by the applicant (please read carefully).

Please place a cross in the box ONLY if any of the below points are applicable

1. I have been subject to a disciplinary sanction by any professional body, employer; tribunal, or education provider;
2. I have unspent convictions
3. I am currently subject to an order or undertaking under the Company Directors Disqualification Act 1986 or subject to any similar restriction under legislation in another jurisdiction;
4. I am currently subject to any bankruptcy restriction order or undertaking, Individual Voluntary Arrangement (IVA) involving payment of monies creditors.

I hereby make application for election as a Fellow Member of CIMA, once I complete the necessary examinations, on the basis of the particulars given below. I declare that:

The particulars I have given in this application are correct and I am making this application myself.

I recognise that I will only be elected to Fellowship on formal approval of this application AND the completion of the examination(s). If I am elected to Fellowship but later found to have provided untrue or misleading information in connection with this application I may be subject to disciplinary action and may be removed from the list of members.

I undertake, if elected, to comply with the Laws of the Institute, to uphold CIMA's professional standards and to comply with the Code of Ethics, adopting the fundamental principles in my working life.

Please note: if you are awarded Fellowship before 1 October, you will be liable to pay the balance of the FCMA subscription for the whole year.

Signed:

Dated:

*这部分的 declaration 是关于犯罪声明的，无需打钩。

2) Senior Experience 的叙述要求:

Senior Experience

Please provide details of the senior experience you have gained that pertain to CIMA's Fellowship experience requirements.

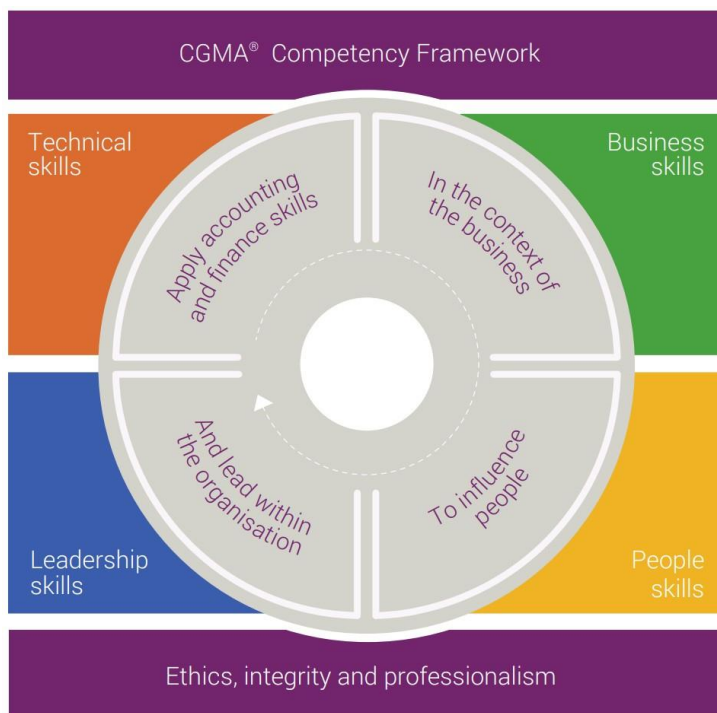
1. 至少 500 字。
2. 本份材料可以参考“资深会员工作经历填写指南”这份指导文件，里面详细叙述了如何叙述高层经历的工作内容。Leadership 主要分为 Technical leadership, Strategic leadership, Functional/Operational leadership. Leadership 内容尽量以具体 sample 或者 case 的实例描述呈现。需要您重点花笔墨的部分是您如何去解决的，如何分析问题、决策过程、以及给公司带来了哪些成果。所以请您务必将 leadership 的描述加强，多从个人角度出发，描述自己做了什么。最好具体能有相关的 case 案例来进行阐述。例如列举实际例子过程来 support 您的工作内容，用 I did sth 来突出自己，描述请涉及以下内容：

- Who did you report to?
- How did you actually approach the task?
- How often did you do it?
- Why did you need to be done?
- Who was the end user/customer?
- What software/ IT did you use?
- How many people helped you or were you part of a team?
- What was the outcome?

注意：在 CIMA 会员工作经历审核中，audit 的工作经验很多情况下不能够作为core，而只能是basic，关于Academic and audit experience，请参考此链接的描述 <http://www.cimaglobal.com/per>

3) 四个技能叙述要求 (Technical skill, Business skill, leadership skill, people skill) :
(可参考附件中名为: cgma-competency-framework 的文件)

1. 叙述能力时，请各位参考 CGMA 能力框架进行叙述：





基础级需要达到 200-250 字

中级的字数达到 250-350 字

高级的字数达到 350-450 字

专家级的字数满足至少 450 字以上

Discussion on competency narrative

Technical -> Financial accounting and reporting -> Transactional accounting and closing processes -> Foundational

Perform all activities within the receivables process; calculate non-complex provisions using appropriate methods; identify risks of bad debts

Technical -> Financial accounting and reporting -> Transactional accounting and closing processes -> Intermediate

Oversee the receivables process; identify ways to mitigate debt-related risks; calculate the impact of debtors on financial ratios; calculate non-routine provisions

Technical -> Financial accounting and reporting -> Transactional accounting and closing processes -> Advanced

Resolve exceptional situations in the receivables process, calculate complex provisions; advise on debtor risk mitigation methods

Technical -> Financial accounting and reporting -> Transactional accounting and closing processes -> Expert

Design receivables and payables processes and relevant strategies according to best practices

此页举例不同的level对叙述内容的要求：

例子中都是选择Technical skill下相同的category及type,但是选择不同的能力层级。

Foundational = Doing at a basic level

Intermediate = Managing, overseeing and analysing

Advanced = Leading and dealing with complex issues

Expert = Designing processes and formulating/influencing strategies

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原则就是你的描述一定要大于等于你所在的 level，也就是说你不能选择的是高级的 level，描述的内容像却一个初级的人员。叙述 experience 的时候请注意：

- 不要用使用小标点分节符号来叙述！
- 请叙述您个人的工作经历，而不是描述您的团队或者公司。请用第一人称描述，这是您的申请，assessor 希望看到和了解得是您的工作经历。
- 建议用一些例子 case 来描述，并且这些例子是真实的，可以主要叙述工作方法，工作执行的频率以及工作结果。（请把重点放在展现您能力的经验上）
- 可以在公众平台作为 reference 搜索到是加分项

4) 两份推荐信:

推荐人定义:

现在共事/以前共事（直线或者虚线）有汇报关系的领导，熟知您的工作内容，并且在组织架构图上的职位高于申请人之上。

注意事项:

- 推荐信必须用推荐人现在所属公司的抬头纸填写
- 推荐人的推荐信必须是申请人在 senior 职位背景下，早期工作的领导不适合作为推荐人，所提供推荐信内容无说服力。
- 推荐人需对申请人管理才能，领导才能的综合能力非常了解，反映申请者所做的工作类型和工作内容，并表示愿意作为推荐人
- 推荐信需要 cover 3 年的工作时间，若目前未满三年，请额外补充上一份工作的领导的推荐信

推荐信内容:

- 推荐信标题请写明：给***做CIMA 会员申请的推荐信
- 推荐人是谁，目前职位及公司
- 推荐人与申请的当时/现在共事时间，公司，以及当时/现在的汇报关系
- 推荐人对你在工作内容的描述与评价（主要是 management、leadership、achievement 及高层工作经历）
- 对申请人的赞美及肯定之词
- 推荐信最后请推荐人签署时间& 姓名，图章不做认可。

推荐信模板：

Example Reference

I am writing to recommend Mr C. to apply for fellowship of CIMA. Mr C. has been employed by xxxx in China since December 2007 to present. I have known Mr C. since January 2013 as he reports to me. Mr C's current position is Finance Director of China and he is also a Board Director of our Hong Kong holding companies and a Board supervisor for China and Taiwan subsidiaries.

Mr C is our CFO in China covering Hong Kong, Mainland China and 5 manufacturing plants , taking full responsibilities of the finance and IT functions. He manages all financial aspects for the group companies in China. He provides excellent financial, business and strategic advice and support to me and the China leadership team in managing the business and operations. From time to time, I and he presented the China business and financial update to the Headquarters CEO and CFO who are always pleased with Mr C's exceptionally well presentation and communication.

Over the past 3+ years, I find Mr C is honest and trustworthy and has the highest level of integrity. He has demonstrated highly experienced financial management skills, excellent communication skills and is providing exceptional value adding business support to me and the entire China leadership team. I am very pleased to have him in my team.

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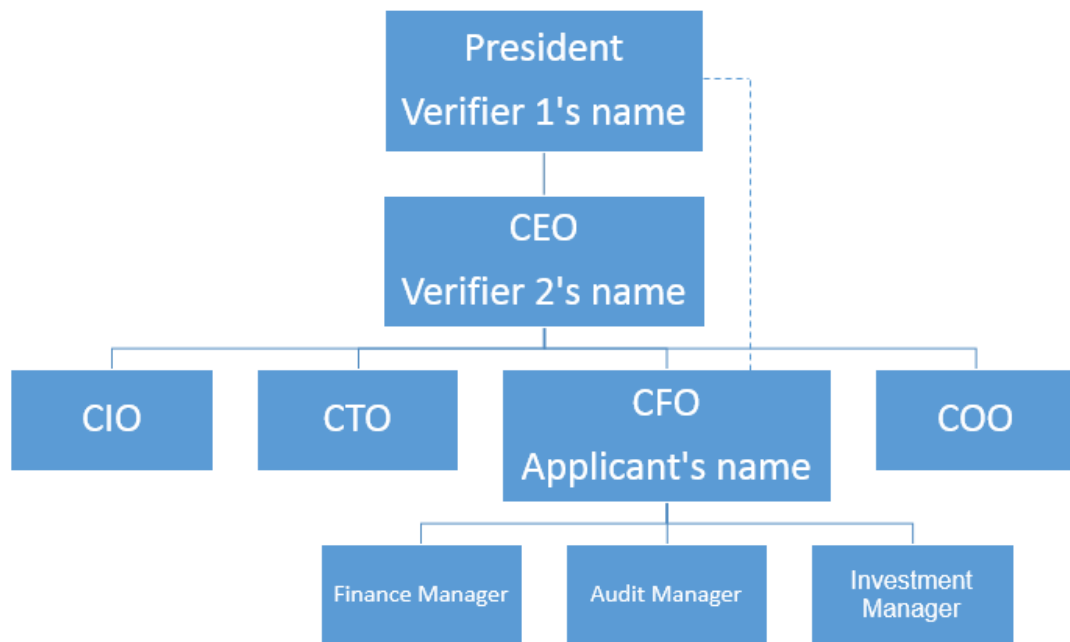
5) 一份申请者现所在企业组织架构图

注意事项：

- 公司组织架构图需要用公司的抬头纸填写
- 组织架构图需要反映出申请人的上下级的汇报关系。（实线、虚线汇报关系如实标明，至少体现低一级的完整架构图）
- 推荐人& 申请人信息方框内信息体现：title + name，其余只需提供title 或部门名称
- 架构图请在空白处标明架构图的有效起止时间
- 在空白处需要简单阐述一下申请人与推荐人的共事期间，上下汇报关系，例：×× reports directly to ×× in 公司名 from ×× to ××

- 组织架构图需要 cover 3 年的工作时间。若您目前公司/职务，工作未满 3 年，需额外提供一份上家公司的组织架构图或者同一家公司的上个职位汇报关系的组织架构图
- 若在同一家公司工作超过 3 年时间，其中有职位晋升过程，请按照职位晋升分开提供
- 该组织架构图需署名，签署人职位必须高于申请者且出现在此架构图中，并且签署时间 + 姓名
- 若您邀请的 2 位推荐人为您同一公司的上级，两位推荐人的职位都需要在组织架构中显示，并且进行签署
- 架构图模板：

*** Company Organization Chart 2013.2 - 2016-5



6) 申请人的简历: 提供一份个人简历需要描述从全日志毕业到现在的所有工作经历

