



Approved Employer PER summary form

for trainees employed by an Approved Employer:
trainee development stream, platinum or gold level

When leaving an ACCA Approved Employer - trainee development stream at platinum or gold level, you must ensure this form is completed. Some sections must be completed by your workplace mentor. The form must be retained in case it is requested by ACCA for practical experience requirement (PER) audit purposes or to validate any claims on your membership application.

The workplace mentor:

- (a) should ideally be a qualified accountant recognised by law in your country and/or a member of an IFAC body
- (b) must have knowledge of your work.

If your workplace mentor is not qualified this form should be signed by a training supervisor who is qualified.

Your name								
Your ACCA student/affiliate number								

YOUR EMPLOYER’S DETAILS – to be completed by trainee

Employer name								
ACCA Approved Employer registration number (if applicable/known)								
Level of Approval	Gold/Platinum (delete as applicable)							
Your start date DD/MM/YYYY								
Your end date DD/MM/YYYY								
Your job title								
Employer address								
Building name or street number								
Street name								
Town/City								
County/State								
Country								
Postcode								
E-mail address								
Web address								

WORKPLACE MENTOR DETAILS* – to be completed by your workplace mentor

Name	
ACCA membership number (if applicable)	
Job title	
<u>Contact address</u>	
Building name or street number	
Street name	
Town/City	
County/State	
Country	
Postcode	
Email address	
Telephone number (inc country code)	
Are you a qualified accountant recognised by law in your country?	Yes/No (delete as applicable)
Which professional bodies are you a member of?	
Does the trainee report to you?	Yes/No (delete as applicable)

* Note to the trainee - If you have had more than one workplace mentor, photocopy this page as necessary.

PERFORMANCE OBJECTIVES SUMMARY

Note to the workplace mentor – From your review of the performance objective statements, sign against those performance objectives you consider the trainee has achieved while under your supervision and employed with your organisation. Guidance on this can be found in the ACCA performance objective booklet.

Performance objective	Workplace mentor's signature Enter your signature against each performance objective that has been achieved	Date In format DD/MM/YYYY
ESSENTIALS		
1. Demonstrate the application of professional ethics, values and judgement		
2. Contribute to the effective governance of an organisation		
3. Raise awareness of non-financial risk		
4. Manage self		
5. Communicate effectively		
6. Use information and communications technology		
7. Manage on-going activities in your area of responsibility		
8. Improve departmental performance		
9. Manage an assignment		

Performance objective	Workplace mentor's signature Enter your signature against each performance objective that has been achieved	Date In format DD/MM/YYYY
OPTIONS		
10. Prepare financial statements for external purposes		
11. Interpret financial transactions and financial statements		
12. Prepare financial information for management		
13. Contribute to budget planning and production		
14. Manage and control budgets		
15. Evaluate potential business/investment opportunities and the required finance options		
16. Manage cash using active management and treasury systems		
17. Prepare for and collect evidence for audit		
18. Evaluate and report on audit		
19. Evaluate and compute taxes payable		
20. Assist with tax planning		