

CFO(SA)TM Handbook



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GLOSSARY OF TERMS

SAIBA	The Southern African Institute for Business Accountants NPC, registration number 1990/005364/08 (“SAIBA”), a <u>non-profit company</u> duly registered and incorporated according to the company laws of the <u>Republic of South Africa</u>
Competency Framework	A 'competency framework' for the purposes of this document, is a structure that sets out and defines each individual competency (such as problem-solving or people management) required by individuals who want to attain the CFO(SA) designation.
South African Qualifications Authority (SAQA)	The South African Qualifications Authority (SAQA) is a juristic person that recognises professional bodies and is mandated by the National Qualifications Framework (NQF) Act. More information about the SAQA can be found at http://www.saqa.org.za/docs/webcontent/2014/about.htm
National Learner Record Database (NLRD)	The NLRD, which has been in operation since November 1999, is the electronic management information system that facilitates the management of the NQF and enables SAQA to report accurately on most aspects of the education and training system of South Africa. More information about the NLRD can be found at http://www.saqa.org.za/docs/webcontent/2012/nqf-nlrd.html
Director	A company director is one of the employees within a group of managers who maintains a prolific role within an organization and usually has the higher role within an organization. This is mainly because they decide on how to control the business and also make the final and key decisions.
Organisation of substance	An organisation of substance is defined by the SAIBA (for the purpose of the CFO(SA) entrance criteria) is an organisation that: <ul style="list-style-type: none"> • Has founding documents and board/committee charters which govern how the board/committees operate; • Publishes an annual report or annual integrated report; • Is audited annually; • Has an established board or governing body that meets at Least 4 times a year; • Has established board committees that meet at least 2 times a year; • Has at least 2 of the following board committees: <ul style="list-style-type: none"> ○ Audit and risk ○ Human resource or Remuneration committee ○ Nominations committee ○ Social and ethics committee ○ Other board committees that fulfil similar functions • Has a majority non-executive directors on the governing body; • Has appointed a company secretary or governance professional advising the board; • Has shareholders or members (where applicable to the type of organisation); and • Holds an annual general meeting (AGM) or annual shareholder or stakeholder meeting (where applicable to the type of organisation).

ACRONYMS

CPD	Continuing Professional Development
SAIBA	Southern African Institute for Business Accountants
NPC	Non-Profit Company
SAQA	South African Qualifications Authority
CFO(SA)	Certified Financial Officer (SA)
NLRD	National Learner Record Database
NQF	National Qualifications Framework
PoE	Portfolio of Evidence and Experience

1. INTRODUCTION

The CFO(SA) Handbook (the Handbook) is aimed at providing a comprehensive guide and overview of all the processes relating to attaining the CFO(SA) designation. The Handbook is reviewed annually and updated as and when necessary. It is the reader's responsibility to ensure that the latest version of the Handbook is consulted and utilised at all times. The content of the Handbook relates to the CFO(SA) application and evaluation processes and includes:

- Overview of SAIBA – as a CFO(SA) designation holder you need to be a member in good standing of SAIBA. Understanding the role of the organisation and how the different structures relate to the CFO(SA) processes is, therefore, key to understanding why membership is so important. More information about how to become a member can be accessed on the website at <https://cfotalks.com/cfo-sa-designation/>
- Overview of the CFO(SA) designation – the benefits and purpose of the professional designation, as well as how it is governed in terms of SAIBA's structures, the Code of Professional Conduct, the assessment processes and the maintenance of the status provides the individual with a broader understanding of how to participate, as well as how to comply.
- CFO(SA) assessment process – this speaks to the assessment of the application as well as the self-assessment that needs to be completed in order to gain the designation. Guidance and support is given in the form of guidelines and templates – all of which can be found on the SAIBA website as well as the CFOTalks website. This Handbook also makes reference to the appeals process related to the self-assessment activities.
- Maintaining the CFO(SA) designation – this details the criteria used to monitor the ongoing maintenance of the CFO(SA) designation and includes information on continuing professional development (CPD) requirements.
- Disciplinary process – CFO(SA) designation holders – whether candidates or designation holders – need to familiarise themselves with the consequences of non-compliance to SAIBA's member rules and regulations.
- Cancellation of the CFO(SA) designation – this section provides details of the different conditions that would result in the CFO(SA)'s designation being cancelled.

Where relevant, templates are provided such as those necessary to assist and complete the process. These documents can be found in an editable form on the website at <http://www.cfotalks.com>

2. OVERVIEW OF SAIBA

A body for members

SAIBA is a voluntary accounting membership body registered as a Non-Profit Company in terms of the South African Companies Act, 2008, with more than 8 000 members.

Members fall into membership tiers, according to experience and qualifications.

By joining our community of accounting professionals, members take the first step towards advancing their careers.

SAIBA offers members accessible and recognisable designations that deliver opportunity.

More than fifty percent of our members are employed in business, the public sector or academia. The remainder manage their own accountancy practices within the private sector.

We are a proudly South African Institute that subscribes to the values incorporated in the South African Constitution and Bill of Rights.

Members and potential members are treated as individuals with unique needs, values, interests and career goals.

"We are here to help them reach these important career goals."

3. OVERVIEW OF THE CFO(SA) DESIGNATION

Official designation

International accreditation

CFO (SA) is recognised by IAFEI, the global body for finance executives. This means should you choose to work abroad, your designation and your competencies are instantly recognised by your peers.

IAFEI currently has 22 Member Institutes in the Americas, Asia, Europe and the Middle East, with a total membership of over 20,000 financial executives. As a CFO (SA) you gain access to all IAFEI resources.

CFO (SA) is authorized by SAQA in terms of the National Qualifications Framework Act, 67 of 2008 and registered at NQF level 9. The highest level awarded to any finance or accounting designation. The Southern African Institute for Business Accountants (SAIBA) are the custodians of the designation.

As a holder of the designation you will be able to use the official designatory letters: CFO(SA) or Certified Financial Officer (SA) next to your name.

As the designation is government sanctioned employers are able to obtain objective confirmation that you have obtained 34 critical competencies required within the typical job function of a finance executive such as a Finance Director, senior Financial Manager or Chief Financial Officer.

Features and benefits

- Officially recognised certification for finance executives in South Africa.
- International accreditation.
- Aristocracy of the finance world.
- Objective confirmation of your worth.
- Advantage over non-designated peers.
- Representation in 22 countries.
- Access to CFO Talks.
- Access to the annual CFO World Congress.
- Access to the CFO Talks network of CFOs.
- Access to discounted executive education.

3.1 Governance Structures for the CFO(SA) certification

There are a few structures involved in the oversight and management of all the processes related to the CFO(SA) designation.

- Memberships Department – receives applications IRO the CFO(SA) designation;
- Education Committee (EdCom) – evaluates member applications IRO various SAIBA designations;
- Evaluation Panel – A panel of CFO peers who will undertake an interview with a new applicant;

3.2 Code of Professional Conduct

SAIBA subscribes to the conduct and engagement standards as issued by the International Ethics Standards Board (IESB) for Accountants. Conduct standards are included in the Handbook of the Code of Ethics for Professional Accountants.

SAIBA is a legislative controlling body for accountants, accounting officers and independent reviewers. As a controlling body we are required to monitor and sanction compliance to standards of member conduct. We perform this function by ensuring compliance by our members to the IESB Handbook.

What you need to do:

Click [here](#) to view the [SAIBA adopted Code of Ethics for Professional Accountants](#)
To retain its status as a controlling body for accountants, accounting officers and independent reviewers and the members licences to perform regulated work for clients, SAIBA members are required to obtain 4-hours of ethics CPD annually.

4. CFO(SA) ASSESSMENT PROCESS - HOW TO BECOME A CFO(SA) DESIGNATION HOLDER



4.1 Pathway to the CFO(SA) designation

There are many qualification and experience routes that may lead to obtaining the job title of FD, senior FM or CFO. The CFO(SA) is awarded if the competencies underlying the job function are met.

So how do you provide proof that you have mastered the competencies?

- You have the job title FD, senior or group FM, CFO or equivalent.
- You work for a large private, public or listed company with a company or group turn-over of more than R30 million.
- You have an honours level qualification in finance, law or engineering.
- You have either of the following:
 - further qualification at an MBA level, OR
 - professional designation at a chartered level such as ACCA, CIMA, or CA, OR
 - extensive experience/courses at senior management level to allow recognition of prior learning
- You have 8 to 10 years post-qualification experience in an executive position, evidence by way of a portfolio of evidence.
- If the above applies to you then:
 - Complete the CFO (SA) application form confirming the above.
 - Provide copies of ID, CV, and degrees/qualifications.
 - Submit a PoE of proficiency confirming the [34 critical competencies](#) have been achieved.
 - Submit to an interview conducted by a finance executive based on the critical competencies.
 - Pay the application (R5 500) and annual membership fee (R6 500 ^{*payment options available}).
 - Annually commit to 40 hours of CPD per annum on topics of your choice.
 - Annually complete an ethics declaration and submit to SAIBA.

Process

- Part 1: Submit your application form online (Pay the admin fee)
- Part 2: Upload your Portfolio of Evidence and Experience (PoE)
- Part 3: Attend a CFO(SA) peer interview
- Part 4: SAIBA approval and certification

Once the CFO(SA) designation has been gained, the candidate is required to maintain their status through continuing professional development (CPD) and maintaining their SAIBA membership. The CPD requirements are detailed [here](#).

4.2 Timeframe

The CFO(SA) designation can be attained within one month, subject to the candidate completing each part of the application process successfully.

The CFO evaluation panel, through an exemption process and in its sole discretion, may decide that a candidate be exempt from the PoE requirement of the CFO(SA) assessment process. This is managed through an internal process that is followed once the individual has successfully applied for the designation. An applicant that is offered exemption may take less time to qualify, however, this depends on their availability to participate in the Peer Interview as per schedule.

4.3 Entrance Criteria

Designation	Base	Qualification	Experience	CPD Required	Documents
Certified Financial Officer (SA) CFO(SA)	Financial Executives that perform at the highest level within the finance/accounting department	NQF Level 9 M-Level Qualification	10 Years	20 Hours Verifiable 20 Hours Non-Verifiable	CV Identity Document Academic Qualification Academic Record Competency Framework

4.4 Fees

Application (R5 500) and annual membership fee (R6 500 *payment options available).

4.5 The Portfolio of Evidence

The PoE is the electronic file in which the required documents are organised. The file must be compiled using the format specified by this Handbook – failure to do so, will result in the PoE being rejected and the candidate will remain unassessed. It is the candidates responsibility to ensure the PoE is successfully submitted.

The PoE file is made up of 4 sections, namely:

- Section 1: Personal Information
- Section 2: Summary of Experience at Finance Director or Executive level
- Section 3: Self-Evaluation Essay
- Section 4: Evidence linked to 34 competency areas.

The table below presents an overview of the content of each section in the PoE:

Section	Description
Section 1: Personal Information	This section includes three documents: <ul style="list-style-type: none">• Personal information - A one-page document providing the necessary personal information of the candidate.• Declaration of Authenticity – this form is signed by the candidate. It lists any document in the PoE that was not authored by the candidate, but that has been used in Section 4 to verify the examples provided in the self-evaluation essay. If this document is not signed and included, the PoE will not be assessed.• Declaration by Peer Verifier – this form is signed by someone who is trusted by the candidate. It is not signed by SAIBA. The person signing this document needs to be an able administrator who can verify that the PoE complies with the guidelines provided by SAIBA. The use of a peer verifier is not compulsory but is strongly recommended.
Section 2: Summary of Experience at FD or Executive level	The summary of the candidate’s competencies at FD or executive level should provide the assessor of the PoE with a high-level overview of the candidate’s experience, as it relates to the examples provided in the self-evaluation essay in Section 3.
Section 3: Self-evaluation Essay	The self-evaluation essay part of the PoE must be written as a narrative by the candidate, explaining to the assessor how he or she has attained competence as a director. This essay creates the context for the evidence presented in Section 4 of the PoE and is based on the 34 competencies contained within the CFO Competency Framework.

	<p>The introduction of the essay is a narrative of the summary of the FD or executive level experience presented in Section 2. This allows the candidate an opportunity to contextualise the examples used.</p> <p>An essay should be about 5000 words (single spaced) or 10 pages long. It is accepted that some individuals may write more and others may write less.</p>
<p>Section 4: Evidence</p>	<p>The documents included in this part should verify and support the examples used by the candidate in Section 3.</p> <p>Only relevant documents should be included in this section. Dates need to be aligned to that which has been referred to in Section 3. One document or piece of evidence can be cross-referenced to more than one competency.</p> <p>It is also important to ensure that this section is cross-referenced to the examples provided in Section 3 so that the assessor of the PoE can easily locate the section of the document that is relevant to the example cited.</p> <p>Where possible, excerpts from documents such as Integrated Reports and Minutes of meetings should be included and not the full document. However, the evidence must be sufficient to illustrate competence.</p>

Section 1: Personal Information

First Name	
Surname	
ID / Passport #	Upload ID copy
Email	
Mobile Number	
Work Phone	
Country of Origin	
Country of Residence	
Employer Name	
Annual Turnover	
Job Title	
Industry Sector	
Highest Qualification	Upload qualifications
Professional Membership	
Years of experience in senior financial executive position	Provide full details as part of PoE
Have you ever been removed as a member of a professional body?	
Have you ever been convicted of theft, forgery, or issuing a forged document?	
Are you an un-rehabilitated insolvent?	
Have you at any time been removed from an office of trust on account of misconduct?	
Is there any other information relating to your professional conduct of which SAIBA should be	

Section 2: Summary of Experience at FD or Executive level

EXTRACTED FROM CV

Section 3: Self-Evaluation Essay

The self-evaluation essay part of the PoE must be written as a narrative by the candidate, explaining to the assessor how he or she has attained competence as a director. This essay creates the context for the evidence presented in Section 4 of the PoE and is based on the 34 competencies contained within the CFO Competency Framework.

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CFO COMPETENCY FRAMEWORK

Competencies for the Steward Role

<p>Steward role: Accounting, control, risk management and asset preservation are the province of the Steward. The Steward must ensure company compliance with financial reporting and control requirements. Information quality and control rationalization are top-of-mind issues for the Steward.</p>		
Competency:	Description:	Evidence (from what you have done):
Working knowledge of risk management, budget, and forecasting tools	Risk management activities such as the use of monitoring, reporting, historical comparisons, evaluation tools, predictive analytics, risk-adjusted forecasts and process controls. Knowledge of budgeting and forecasting for units of an organization and the organization as a whole.	<i>Describe briefly here and /or upload evidence to portal</i>
Investment and credit risk knowledge	Knowledge of risks and returns for investments and credit (e.g. customer credit).	<i>Describe briefly here and /or upload evidence to portal</i>
Accounting knowledge (IFRS and taxation)	Up-to-date knowledge of IFRS and taxation in South Africa and all countries in which the company accesses capital markets.	<i>Describe briefly here and /or upload evidence to portal</i>
External financial and regulatory reporting knowledge	Knowledge of regulatory reporting requirements in South Africa and other countries in which the organization does business. If the organization is cross listed, must understand the requirements of relevant statutes. Knowledge of industry- specific requirements.	<i>Describe briefly here and /or upload evidence to portal</i>

Understanding financial information systems and informational needs of decision makers	Thorough understanding of the informational needs of decision makers within the organization (from top level down through the organization). Overseeing a financial information system that is capable of producing useful information to meet those needs (e.g. budgeting, profitability of products, business units, and customer relationships)	<i>Describe briefly here and /or upload evidence to portal</i>
Understanding of systems, processes, and internal controls over financial information	Ability to create or oversee IT systems, processes, and internal control policies and procedures to ensure high quality of information.	<i>Describe briefly here and /or upload evidence to portal</i>
Understanding the business environment	Understanding the environment in which the organization operates. This includes the industry, the regulatory environment, and economic environment, etc.	<i>Describe briefly here and /or upload evidence to portal</i>
Fraud prevention, detection, investigation	Understanding of the types of fraud that can be committed within the organization and the conditions that often lead to fraud. Continuous monitoring of control systems to watch for weaknesses that could make committing fraud easier. Having a healthy scepticism to investigate possible fraud when red flags appear.	<i>Describe briefly here and /or upload evidence to portal</i>

Competencies for the Operator Role

Operator role: Efficiency and service levels are the primary areas of focus for the Operator. The Operator must dynamically balance cost and service levels in delivering on the finance organization's responsibilities, and adapt finance's operating model as necessary. Talent management, offshoring and shared service decisions are often the key issues to be addressed. This role is oriented toward best practices of the finance function itself.

Competency:	Description:	Evidence (from what you have done):
Staff planning	Branding the company as a career destination for finance professionals is critical for attracting top talent.	<i>Describe briefly here and /or upload evidence to portal</i>

Project management	Identifying, developing, and overseeing projects that create value and meet or exceed financial goals.	<i>Describe briefly here and /or upload evidence to portal</i>
Staff management, mentoring, team building, and creating accountability	Manage staff not only for maximum performance, but also for advancement within the organization. Cert. Fin. Officer (SA) must provide their own future leaders with similar advancement opportunities, and give them room to excel, even beyond the realm of finance. Ability to manage a diverse staff with differing backgrounds,	<i>Describe briefly here and /or upload evidence to portal</i>
Corporate finance	Develop sets of strategic measures that can be used to anticipate challenges and monitor progress	<i>Describe briefly here and /or upload evidence to portal</i>
Treasury and investment management	Monitoring financing activities and adapting strategies and tactics to changes in debt and equity markets. Knowledge and use of financial instruments to gain the greatest risk/return on investments.	<i>Describe briefly here and /or upload evidence to portal</i>
Mergers and acquisitions, strategic alliances	Ability to analyse potential M&A deals and strategic partnerships for strategic benefit.	<i>Describe briefly here and /or upload evidence to portal</i>
Maximizing capital employed	Enhance value and service to the organization while holding down costs. Carry out cost-effective services without disruption. Outsourcing may be one alternative.	<i>Describe briefly here and /or upload evidence to portal</i>
Achievement / results orientation	The Cert. Fin. Officer (SA) must be able to translate performance into results. Being responsive to the needs of the organization and meeting those needs using measures that are appropriate and understandable.	<i>Describe briefly here and /or upload evidence to portal</i>
Organizational and administration skills	Ability to organize and prioritize effectively. The Cert. Fin. Officer is able to process large amounts of information with limited time constraints, and must identify situations in which digging into details is necessary versus remaining in an oversight position. Being organised oneself, the Cert. Fin Officer (SA) is better able to function more effectively.	<i>Describe briefly here and /or upload evidence to portal</i>

Competencies for the Catalyst Role

Catalyst role: The Catalyst is an agent for change, focused on establishing a value attitude throughout the organization. The Catalyst gains business alignment to identify, evaluate and execute strategies, and serves as a business partner to other decision makers including business unit leaders, the chief information officer, and sales and marketing leaders. The Catalyst establishes a structure of enterprise accountability directed toward results, drives enterprise execution and gains acceptance from business management as the organization's catalyst. This role is oriented toward best practices of the entire organization.

Competency:	Description:	Evidence (from what you have done):
Leadership and influence	Inspiring and motivating others in the organization. Providing the necessary guidance and direction to meet and exceed organizational goals and objectives.	<i>Describe briefly here and /or upload evidence to portal</i>
Communication/ presentation skills and executive presence	Ability to communicate effectively in writing and verbally, to connect with others, to persuade others, and to communicate complex information in an easy-to-understand manner. Ability to act appropriately for each occasion and with each audience. To be accessible to and respected by others at all levels in the organization.	<i>Describe briefly here and /or upload evidence to portal</i>
Corporate governance	Understanding elements of corporate governance and instituting best practices for creating a culture of excellence and ethical performance.	<i>Describe briefly here and /or upload evidence to portal</i>
Negotiation	Ability to negotiate with others in both friendly and adverse circumstances. Being a good listener is an important element in negotiation. Ability to resolve conflict.	<i>Describe briefly here and /or upload evidence to portal</i>
Relationship building and collaboration	Cert. Fin. Officer (SA) s interacts widely with members of the entire organization. Networking with others, developing strong relationships, being a good team player and good collaborator. Being a good bridge-	<i>Describe briefly here and /or upload evidence to portal</i>
Personal integrity, ethics, ability to identify ethical	Understanding motivations of oneself and others, and recognizing the very real possibility of unethical behaviour. Taking active and public steps to thwart misbehaviour and encourage ethical behaviour. Being	<i>Describe briefly here and /or upload evidence to portal</i>

dilemmas and make ethical decisions	a role model. Setting the “tone at the top”. Having a social conscience.	
Change management and flexibility	Manage change with minimum disruption; being a positive change agent. Being flexible and assisting others within the organization to be the same.	<i>Describe briefly here and /or upload evidence to portal</i>
Self-awareness and insight	To be able to see one’s own faults or mistakes and take responsibility for them. To assist others to do the same without doing so in a patronizing manner or with harsh criticism/blame.	<i>Describe briefly here and /or upload evidence to portal</i>
Persistence	Having the courage and resilience to persist in the face of adversity. Being passionate about one’s work enables persistence.	<i>Describe briefly here and /or upload evidence to portal</i>

Competencies for the Strategist Role

<p>Strategist role: The Strategist is a director, focused on defining the future of the company to enhance business performance and shareholder value. The Strategist provides a financial perspective on innovation and profitable growth, leverages this perspective to improve risk-awareness, strategic decision-making and performance management integration, and translates the expectations of the capital markets into internal business imperatives. This role is oriented toward long-term, strategic issues, and is outwardly directed.</p>		
Competency	Description:	Evidence (from what you have done):
Goal setting / visioning	<p>The ability to develop visions that prompt buy-in from a wide range of organizational stakeholders. As well, the ability to align finance</p> <p>Function’s priorities with business strategy and organizational goals. Being a forward thinker.</p>	<i>Describe briefly here and /or upload evidence to portal</i>
Strategic risk management	<p>Understanding the “big picture,” that is, how the environment could impact the organization both negatively and positively. Understanding how internal and external factors can interact to create or reduce risk.</p>	<i>Describe briefly here and /or upload evidence to portal</i>

Strategic thinking and decision-making	The ability to take a holistic and futuristic perspective of the organization that recognizes the synergies and interdependencies between the different parts. This perspective is leveraged in the use of information to create strategies that enable growth. This ability uses innovation and creativity, and often involves thinking “outside the box”.	<i>Describe briefly here and /or upload evidence to portal</i>
Performance management integration	Performance management integration is a holistic approach that spans all the processes and technologies related to performance management, and consists of the integration of reporting and performance measurement, budget planning and forecasting, and organizational alignment. This includes the elimination or reduction of “non-value-added” activities, measuring financial performance, establishing efficiency metrics, measuring non-financial performance and measuring customer satisfaction.	<i>Describe briefly here and /or upload evidence to portal</i>
Critical thinking	The ability to make assertions based on sound logic and evidence. This consists of being able to distinguish between fact and opinion, ask questions, make detailed observations, and uncover assumptions. Make sound conclusions based on appropriate information.	<i>Describe briefly here and /or upload evidence to portal</i>
Managing ambiguity	The ability to deal effectively with uncertain situations. This requires the ability to control one’s anxiety levels so that a level of clarity in thinking is maintained in order that an accurate evaluation of the situation can be ascertained and an effective response made.	<i>Describe briefly here and /or upload evidence to portal</i>
Dedication to continuous improvement	Having a desire to learn and to never be satisfied with current knowledge. Being inquisitive; taking every opportunity to learn new things and continually working on self-improvement. Self-motivated.	<i>Describe briefly here and /or upload evidence to portal</i>
Advocate / ambassador for the organization	As the leading person in the organization, the Cert. Fin. Officer (SA) must represent the organization to the outside world. This includes networking with shareholders, analysts, suppliers, customers, and the public at large. The Cert. Fin. Officer (SA) must have a keen sense of when and how to best	<i>Describe briefly here and /or upload evidence to portal</i>

	portray both positive and negative information about the organization.	
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