

ACL



# CAREER PASSPORT

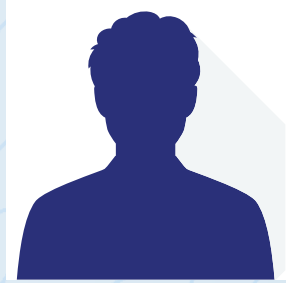


Accounting and  
Finance



Pathways

## About You



Name:

Location:

Current employment status:      **Employed**      **Unemployed**

I hope to develop the following soft skills on my journey:

Communication

Team Work

Creativity

Problem Solving

Leadership

Time Management

Adaptability

Decision Making

What is your ultimate goal?

# YOUR FINAL DESTINATION

Before you start on your journey, you may find it useful to have a final destination in mind. Take a look at the list of accounting and finance related careers and select any that may be of interest.

## Accounting Technician

An accounting technician supports accountants by preparing financial documents, maintaining records and assisting with financial reporting.

## Actuary

An actuary analyses statistical data to assess risk and uncertainty. This helps businesses to make informed financial decisions.

## Auditor

An auditor looks at financial records and systems within an organisation to ensure compliance, accuracy and efficiency.

## Bank Manager

A bank manager oversees the staff, customer service and operations of a bank branch.

## Bookkeeper

A bookkeeper maintains accurate financial records for a company, including recording transactions and generating financial reports.

## Credit Controller

A credit controller manages and organisations credit policies and processes, ensuring timely payment of invoices and managing overdue accounts.

## Finance Officer

A finance officer handles the financial planning, budgeting and reporting to support the financial health of an organisation.

## Financial Adviser

A financial advisor provides personalised financial planning and advice to customers, supporting them to achieve their financial goals.

## Investment Analyst

An investment analyst carries out research and analysis on investment opportunities. They provide insights and advice to help clients to make informed decisions.

## Management Accountant

A management accountant analyses financial data to assist management in making strategic decisions. They focus on budgeting, performance and cost management.

## Money Adviser

A money advisor provides guidance and support on managing finances, dealing with debt and budgeting effectively.

## Payroll Administrator

A payroll administrator manages the payroll process, making sure that employees are paid the correct amount and on time.

## Tax Adviser

A tax advisor provides advice on tax matters, helping clients to minimise tax liabilities and ensure compliance with tax laws.



To learn more visit [www.aclessex.com/pathways](http://www.aclessex.com/pathways)

## WHERE WILL YOU GO?

### AAT Certificate in Accounting Level 2

Gain a foundation in finance administration and core accounting skills.

### AAT Diploma in Accounting Level 3

This qualification aims to provide you with the higher accounting techniques and disciplines.

### Level 2 Accounts/Finance Assistant Apprenticeship

Suitable for those who are new to Accountancy or Finance and would like to start their career in this sector.

### AAT Diploma in Professional Accounting Level 4

Learn the knowledge to master complex accounting tasks and qualify for senior finance roles.

## OTHER DESTINATIONS

- English, Maths and Digital
- Team Leading Level 2
- Leadership and Management Level 3
- Team Leader Apprenticeship Level 3
- Coaching Professional Apprenticeship Level 5
- Operations or Departmental Manager Apprenticeship Level 5
- And many more!





# Do you need to improve your essential skills?

Select the skills you feel you already have below. If you have selected most skills you may wish to move straight onto the next adventure.

## English:

- Verbal communication and presentation skills
- Communicating information, ideas and opinions clearly
- Read and understand different types of text
- Organise writing for different purposes
- Punctuate and use grammar correctly
- Construct sentences consistently and accurately

## Maths:

- Fractions
- Percentages

## Maths continued:

- Decimals
- Graphs & Charts
- Shapes
- Ratio

## Digital:

- Turn on and use controls on a device
- Connect to a WiFi network and use the internet
- Store personal information securely
- Make use of accessibility tools
- Use Microsoft Office applications
- Communicate online

## CONTINUE ON YOUR JOURNEY?

Congratulations on improving your essential skills. You have already developed lots of skills and knowledge that employers are looking for.

Continue adventure 





Travel time  
34 weeks

# AAT Certificate in Accounting Level 2

Select the skills you feel you already have below. If you have selected most skills you may wish to move straight onto the next adventure.

## About the programme:

This qualification aims to provide you with a foundation in finance administration and core accounting skills, including double-entry bookkeeping, basic costing, and sales and purchase ledgers.

## Topics include:

- How to set up bookkeeping systems
- Processing customer transactions
- Processing supplier transactions
- Processing receipts and payments
- Processing transactions into the ledger accounts

## Topics include continued:

- Using control accounts
- Reconciling a bank statement with the cash book
- Producing trial balances
- The cost recording system within an organisation
- Using cost recording techniques
- Providing actual and budgeted cost and income
- Using tools and techniques to support cost calculations
- The principles of contract law
- The external business environment
- The impact of setting up different types of business entity

## CONTINUE ON YOUR JOURNEY?

Congratulations on achieving the AAT certificate in accounting level 2 qualification. You have already developed lots of skills and knowledge that employers are looking for.

Continue adventure 





Travel time  
52 weeks

# AAT Accounts/Finance Assistant Apprenticeship Level 2

Select the skills you feel you already have below. If you have selected most skills you may wish to move straight onto the next adventure.

## About the programme:

Suitable for those who are new to Accountancy or Finance and would like to start their career in this sector.

## Knowledge includes:

- Foundations of professional ethics and codes of conduct
- Legal entity and organisational structures
- Digital financial and accounting packages
- Using and maintaining financial records
- Cost recording systems within an organisation
- Principles of bookkeeping and controls

## Skills include:

- Recording transactional data
- Using the organisation's standard tools and processes
- Recognising and rectifying routine errors
- Planning and reviewing accounting and finance tasks
- Communicating with stakeholders to deliver results

## Behaviours include:

- Team working to provide support and collaborate
- Responding constructively to changing work requirements
- Self-motivated to seek and act upon feedback
- Focused on the importance of delivering excellent service

## CONTINUE ON YOUR JOURNEY?

Congratulations on achieving an accounting level 2 apprenticeship. You have already developed the knowledge, skills and behaviours needed for a range of careers.

Continue adventure 



# DAY TRIPS

Before, during or after your journey, you may decide to go on some day trips. These are short (mostly one day) courses which can help you to further develop your skills. Check them off as you attend the sessions.

## What Other Job Can I Do?

For those in between jobs or considering a career change who want to increase their ability to think wider in the scope of employment opportunities available.

## Confidence Building

For those who would like to build their confidence on a personal level and develop their skills, to enhance their opportunities to gain employment.



## Stepping Up Your Motivation

For anyone in between jobs or who is looking for new work or volunteering opportunities, who finds it challenging to keep motivated.

## Procrastination and Time Management

For or anyone who struggles with procrastination and organising their time effectively whether at home or work or those who want to increase productivity.

## Managing Your Resilience

For those who would like to learn the techniques to manage their resilience more effectively and successfully whilst developing their current skill set.

## Assertiveness Skills For Work

For those who have had or is experiencing challenges in the work place with keeping assertive, confident and communicating openly and honestly about their needs.

## Proactive Job Searching Skills

For those who are actively seeking work and would like to build their confidence and refresh their job searching skills, to increase their chances in gaining an interview.

To learn more visit [www.aclessex.com/pathways](http://www.aclessex.com/pathways)





Travel time  
59 weeks

# AAT Diploma in Accounting Level 3

Select the skills you feel you already have below. If you have selected most skills you may wish to move straight onto the next adventure.

## About the programme:

This qualification aims to provide you with the higher accounting techniques and disciplines, and qualify for AAT bookkeeping membership (AATQB).

## Topics include:

- Business types, structure and governance
- The impact of the external and internal environments
- How businesses and accounts comply with professional ethics
- The impact of new technologies in accounting
- Communicating information to stakeholders
- The accounting principles for final accounts preparation

## Topics include continued:

- The principles of advanced double-entry bookkeeping
- Reconciling a bank statement with the cash book
- The acquisition and disposal of non-current assets
- Prepare and record depreciation calculations
- Produce and extend the trial balance
- The purpose and use of management accounting
- Investigate deviations from budgets
- Calculate VAT
- Review and verify VAT returns
- The principles of payroll

## CONTINUE ON YOUR JOURNEY?

Congratulations on achieving the AAT diploma in accounting level 3 qualification. You have already developed lots of skills and knowledge that employers are looking for.

Continue adventure 





# AAT Certificate in Bookkeeping Level 3

Select the skills you feel you already have below. If you have selected most skills you may wish to move straight onto the next adventure.

## About the programme:

This qualification aims to provide you with enhanced skills and expertise in bookkeeping activities, critical for the smooth and efficient running of all finance departments.

## Topics include:

- The accounting principles for final accounts preparation
- The principles of advanced double-entry bookkeeping
- Acquisition and disposal of non-current assets
- Prepare and record depreciation calculations
- Record period end adjustments
- Produce and extend the trial balance

## Topics include continued:

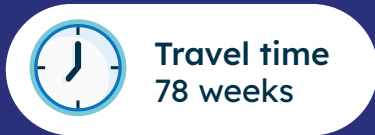
- Financial statements for sole traders and partnerships
- Interpret financial statements using profitability ratios
- Prepare accounting records from incomplete information
- Legislation requirements relating to VAT
- Calculate VAT
- Review and verify VAT returns
- Understand principals of payroll
- Report information within the organisation

## CONTINUE ON YOUR JOURNEY?

Congratulations on achieving the AAT certificate in bookkeeping level 3 qualification. You have already developed lots of skills and knowledge that employers are looking for.

Continue adventure 





# AAT Assistant Accountant Apprenticeship Level 3

Select the skills you feel you already have below. If you have selected most skills you may wish to move straight onto the next adventure.

## About the programme:

This apprenticeship is designed as a professional route into the Accountancy industry, and can lead into a variety of careers with supporting professional qualifications.

## Knowledge includes:

- Financial accounting, adjustment and reporting
- Management accounting
- Creating and maintaining financial records
- Potential vulnerabilities within systems of financial control
- Indirect taxation
- Digital financial and accounting packages

## Skills include:

- Assist with the investigation to financial information queries
- Record and analyse financial data
- Apply double entry bookkeeping and accounting standards
- Assist with production of accurate financial information
- Investigate, resolve or escalate transactional queries

## Behaviours include:

- Build strong collaborative working relationships
- Apply a transparent, objective and sustainable manner
- Organise work efficiently and effectively
- Accept changing priorities and working requirements

## CONTINUE ON YOUR JOURNEY?

Congratulations on achieving an AAT assistant accountant level 3 apprenticeship. You have already developed the knowledge, skills and behaviours needed for a range of careers.

Continue adventure 



# TRAVEL LOG



Before you continue on your journey, you might like to spend some time thinking about where you started, where you have gone and where you would like to go next. You can use these pages to explore this.

At the beginning of your journey, you decided on an ultimate goal. Have you made any progress towards this yet?

Has your goal or the skills you want to develop changed at all?

Where would you like to go next on your journey and why?

Do you feel like you have made good progress?

Yes

No

I'm not sure

Which of the below skills have you developed so far?

Communication

Team Work

Creativity

Problem Solving

Leadership

Time Management

Adaptability

Decision Making

As you continue, would you do anything differently?

Any other thoughts:

Continue adventure 





Travel time  
74 weeks

# AAT Diploma in Professional Accounting Level 4

Select the skills you feel you already have below. If you have selected most skills you may wish to move straight onto the next adventure.

## About the programme:

This qualification aims to provide you with knowledge to master complex accounting tasks and qualify for senior finance roles, as well as AAT full membership.

## Topics include:

- Implement the organisational planning process
- Use internal processes to enhance operational control
- Use techniques to aid decision making
- Analyse and report on business performance
- Reporting frameworks
- Draft statutory financial statements

## Topics include continued:

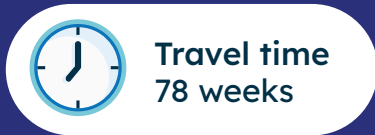
- Draft consolidated financial statements
- Interpret financial statements using ratio analysis
- Evaluate internal control systems
- Evaluate an organisation's accounting system
- Recommend improvements to accounting systems
- Prepare tax computations
- Understand the tax implications of business disposals
- Calculate UK taxpayers' total income
- Calculate Income Tax and National Insurance contributions
- Understand the principles of Inheritance Tax

## CONTINUE ON YOUR JOURNEY?

Congratulations on achieving the AAT diploma in professional accounting level 4 qualification. You have already developed lots of skills and knowledge that employers are looking for.

Continue adventure 





Travel time  
78 weeks

# AAT Professional Accounting Technician Apprenticeship Level 4

Select the skills you feel you already have below. If you have selected most skills you may wish to move straight onto the next adventure.

## About the programme:

This programme is designed to further the learner's knowledge and experience of bookkeeping and accounting with the aim of gaining an AAT Level 4 qualification.

## Knowledge includes:

- The industries and environments an organisation operates
- Understanding of the relevant ethical standards
- Apply professional standards and legal regulations
- Evaluate an organisation's systems and processes
- Understand and/or validate the accounting standards

## Skills include:

- Create and interpret information
- Effectively communicate across the organisation
- Proactively manage your own development
- Work to tight deadlines and respond to changing priorities
- Apply accounting, tax knowledge to consistently

## Behaviours include:

- Actively engage in the wider business,
- Honest and principled in all actions and interactions
- Demonstrates the drive and energy to get things done
- Accept changing priorities and working requirements

## CONTINUE ON YOUR JOURNEY?

Congratulations on achieving an AAT professional accounting technician level 4 apprenticeship. You have already developed the knowledge, skills and behaviours needed for a range of careers.

Continue adventure 





# Principles of Team Leading Level 2

Select the skills you feel you already have below. If you have selected most skills you may wish to move straight onto the next adventure.

## About the programme:

This qualification is designed for those who want to gain the knowledge and understanding required to successfully lead a team. It will focus on leading a team in a business environment.

This is a flexible learning course which means that you can study at any time that suits you.

## Mandatory units:

- Principles of team leading
- Understanding business
- How to communicate work-related information

## Optional units:

- Understanding customers
- How to deliver customer service and resolve problems
- Equality and diversity in the workplace
- Health and safety procedures in the workplace
- How to develop and deliver a presentation
- Introduction to coaching
- Introduction to mentoring
- Understanding personal development
- How to manage performance and conflict

## CONTINUE ON YOUR JOURNEY?

Congratulations on achieving a principles of team leading level 2 qualification. You have already developed lots of skills and knowledge that employers are looking for.

Continue adventure 





# Principles of Leadership and management Level 3

Select the skills you feel you already have below. If you have selected most skills you may wish to move straight onto the next adventure.

## About the programme:

This qualification is for new and aspiring junior managers. Pick up the skills and understanding you need to deal with management responsibilities.

This is a flexible learning course which means that you can study at any time that suits you.

## Mandatory units:

Solving Problems and Making Decisions

## Optional units include:

Innovation and Change in an Organisation

Planning Change in the Workplace

Leading and Motivating a Team Effectively

Planning and Allocating Work

Innovation and Creativity in the Workplace

Conflict Management in the Workplace

How to Motivate to Improve Performance

Stress Management in the Workplace

Discipline in the Workplace

Recruitment and Selection of New Staff

The Induction of New Staff in the Workplace

Setting Team Objectives in the Workplace

Understanding Leadership

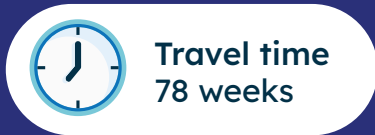
**CONTINUE ON  
YOUR JOURNEY?**

Congratulations on achieving a principles of leadership and management level 3 qualification. You have already developed lots of skills and knowledge that employers are looking for.

Continue adventure 







Travel time  
78 weeks

## Team Leader Apprenticeship Level 3

Select the skills you feel you already have below. If you have selected most skills you may wish to move straight onto the next adventure.

### About the programme:

This is an ideal programme for professionals who are new to management, or for those looking to develop their leadership skills to improve their performance.

### Knowledge includes:

- Different leadership styles and the benefits of coaching
- Organisational cultures, equality, diversity & inclusion
- People and team management models
- HR systems and performance management techniques
- How to chair meetings and hold challenging conversations
- How organisational strategy is developed

### Skills include:

- Communicate organisation strategy and team purpose
- Support the development of the team
- Build a high-performing team by supporting individuals
- Use effective negotiation and influencing skills
- Manage resources and risk and monitor progress

### Behaviours include:

- Determination when managing difficult situations
- Able to build trust with others
- Operates within organisational values
- Demonstrates resilience and accountability

## CONTINUE ON YOUR JOURNEY?

Congratulations on achieving a team leading level 3 apprenticeship. You have already developed the knowledge, skills and behaviours needed for a range of careers.

Continue adventure 



# SEND US A POSTCARD

We would love it if you would send us a postcard to let us know all about your journey and the adventures you have been on. We would like to share your story with others to inspire them to start their own journey.

If you are happy for us to use this for marketing purposes, please answer the below questions in an email or document and send it to us. We have included some helpful hints below of things you could write about.



**TO: The ACL Marketing Team**

**[ACL.Marketing@essex.gov.uk](mailto:ACL.Marketing@essex.gov.uk)**

## Please tell us a little bit about yourself

You may wish to include:

- Your interests
- Your learning goals
- Your career/progression goals
- Your family life

Please email us at [ACL.Marketing@essex.gov.uk](mailto:ACL.Marketing@essex.gov.uk)

## Why did you decide to enrol on this course?

You may wish to include:

- How it relates to your interests/career goals
- The skills you have/are hoping to develop
- How the qualification will benefit you

## If you have not yet progressed into higher education or work: which degree course/other qualifications/career do you aim to progress onto?

You may wish to include:

- Your next steps
- Why you have chosen that progression route
- If/how your course at ACL will help you

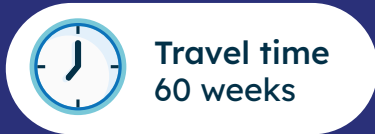
## If you're in higher education or work: please tell us more about what you're currently studying or the job you are in, and your career/learning aspirations?

You may wish to include:

- What you're currently doing
- If/how your course at ACL is supporting you
- Any future goals/plans

**Anything else you want to tell us!**





Travel time  
60 weeks

# Coaching Professional Apprenticeship Level 5

Select the skills you feel you already have below. If you have selected most skills you may wish to move straight onto the next adventure.

## About the programme:

Designed for those who work with a wide range of individuals and teams across organisations, to empower and engage with them, to enhance their professional performance.

## Knowledge includes:

- Reflective practice and emotional intelligence
- Diversity, inclusion and bias theories
- Coaching contracting and re-contracting
- Methods of communication
- Differences between coaching, mentoring and training
- The range of coaching models and techniques

## Skills include:

- Working with those receiving coaching to set clear goals
- Contracting with all relevant stakeholders
- Stakeholder management inc. challenging and senior people
- Delivering feedback that is useful and non-judgemental
- Questioning techniques to raise self-awareness

## Behaviours include:

- Act as an ambassador for a coaching mindset
- Is spontaneous, open and flexible
- Demonstrates respect and engendering trust
- Committed to self-development, including self-reflection

## CONTINUE ON YOUR JOURNEY?

Congratulations on achieving a coaching level 5 apprenticeship. You have already developed the knowledge, skills and behaviours needed for a range of careers.

Continue adventure 





Travel time  
104 weeks

# Operations or Departmental Manager Apprenticeship Level 5

Select the skills you feel you already have below. If you have selected most skills you may wish to move straight onto the next adventure.

## About the programme:

This programme is suitable for professionals with responsibility for achieving operational or departmental goals and objectives as part of their organisation's strategy.

## Knowledge includes:

- Operational management approaches and models
- Setting up and managing a project using techniques
- Managing budgets & financial forecasting
- Different leadership styles
- Developing and managing high performing teams
- Approaches relationship management

## Skills include:

- Creating plans in line with organisational objectives
- Support, manage and communicate change effectively
- Plan, organise and manage resources to deliver outcomes
- Support development through coaching and mentoring
- Able to build trust, and use effective negotiation

## Behaviours include:

- Drive to achieve in all aspects of work
- Determination when managing difficult situations
- Seeks the views of others and values diversity
- Positive and adaptable, responding well to feedback

## CONTINUE ON YOUR JOURNEY?

Congratulations on achieving an operational or departmental manager level 5 apprenticeship. You have already developed the knowledge, skills and behaviours needed for a range of careers.

Continue adventure 



# HOW TO ENROL

Once you have chosen your course/s, you can either enrol on our website or by phone.

## 1. ONLINE

Visit [www.aclessex.com](http://www.aclessex.com) and create an account. You can then either search for the course title using the search box or browse our website.

Once the course has been selected, you will be asked to fill out an enrolment form (non-qualification) or asked to enrol onto an assessment session (qualification).

## 2. PHONE

Call **0345 603 7635** and you will be put through to a member of our customer service team. Before calling, please make a note of the course title or course code.

Our phone lines are open Monday to Friday, from 8:30am to 5pm, unless otherwise stated.



[aclessex.com/contact-us](http://aclessex.com/contact-us)



[lifelong.learning@essex.gov.uk](mailto:lifelong.learning@essex.gov.uk)



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# Pathways