

# Business Valuation Specialisation

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*Chartered Accountants  
Australia and New Zealand*



# Business Valuation Specialisation

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*Chartered Accountants ANZ, in partnership with Kaplan, offers a Business Valuation Specialisation Program. Unique to this offering are two flexible pathways to specialisation which align to different stages of your career. The program presents an opportunity to sharpen your skills, gain formal accreditation and realise new opportunities as a recognised specialist in this complex and exciting field.*

## Enhance your career with a CA Specialisation

CA ANZ Specialisation is an accreditation that helps you stand out through the recognition of your skills and experience in this chosen area.

As a CA Business Valuation Specialist, you are recognised for your significant knowledge and experience in an intellectually rewarding field that include producing independent expert reports and financial reports, as well as working on a variety of engagements involving tax issues, disputes, family law, shared based payments, merger and acquisitions and strategic advice.

## Formal recognition of your skills and experience

The Business Valuation Specialisation Program is available to full Chartered Accountants ANZ members as well as Affiliate members residing in Australia, New Zealand or internationally. Upon successful completion of the Business Valuation Specialisation course, participants can apply for formal accreditation as a CA Business Valuation Specialist (full CA member) or a Business Valuation Specialist (Affiliate member).

## The Benefit of Business Valuation Specialisation

Your official accreditation demonstrates to clients and organisations your skills, knowledge and experience in the business valuation field.

## Build your personal brand and credibility

Adding CA Business Valuation Specialist under your name on correspondence and marketing collateral can set you apart from the rest. You also have the exclusive right to include the CA ANZ branded specialist banner in your communications.

## Open doors

As a CA Business Valuation Specialist, you are well positioned to accept referrals from other practitioners, strategic partners, associated professionals and clients.

## Expand your network

Networking events with peers who share your interests and can provide insights into your field and forge valuable business relationships.

## Strengthen your reputation

Your recognition as a CA Business Valuation Specialist acknowledges your skills, knowledge and experience to clients and peers.

## Stay ahead of the curve

As well as exclusive invitations to educational networking events, your approval as a CA Business Valuation Specialisation entitles you to receive a discount on any related conferences including the biennial Business Valuation Conference. Furthermore, you will also have access to complimentary professional development courses exclusive to CA Business Valuation Specialists.

## All in one place

CA Business Valuation Specialisation is one of the few accreditation business valuation programs available, and you don't need to become a member of another professional body.

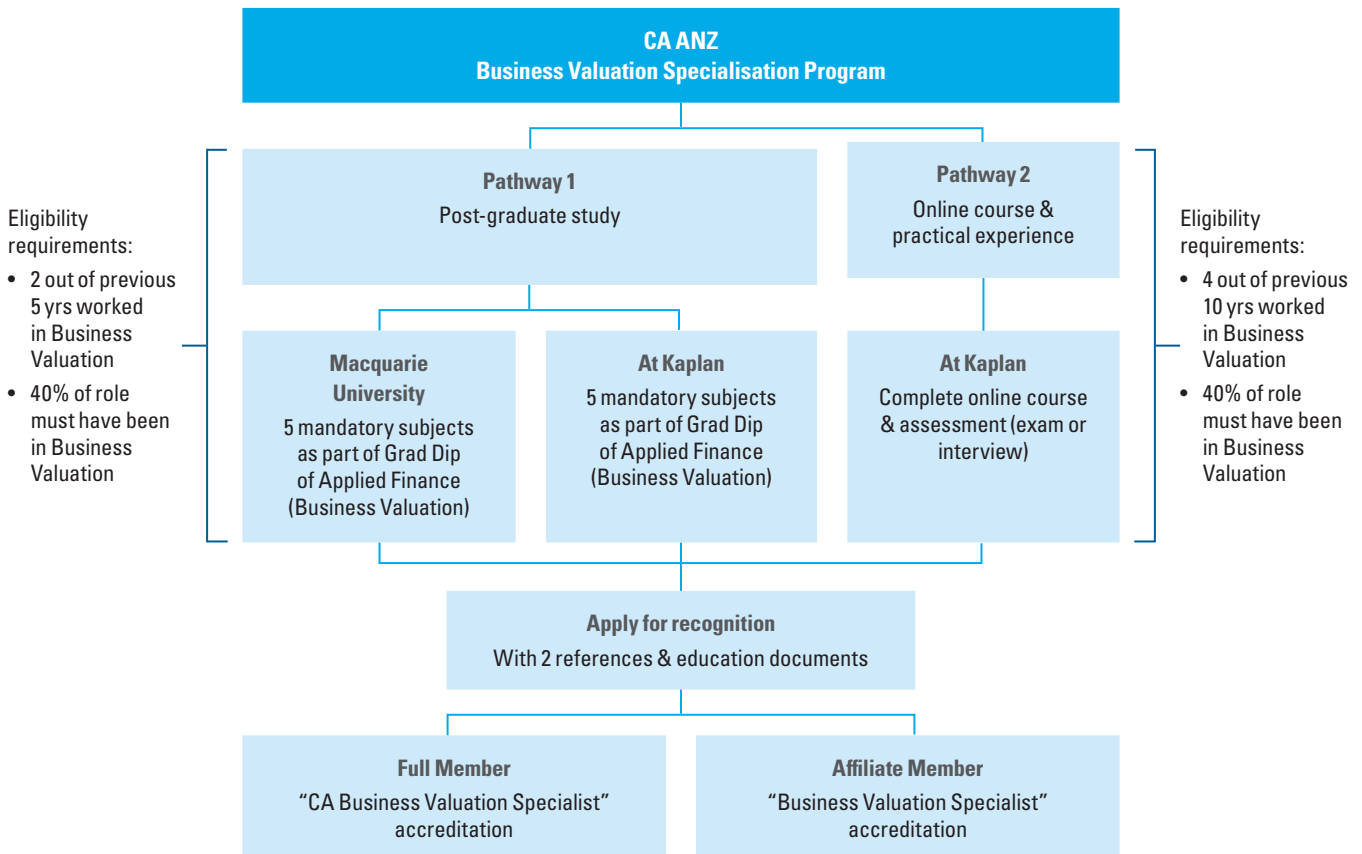
**"Business valuation touches on so many areas of an accountant's role – financial reporting, tax, mergers and acquisitions and strategic decision making, to name a few. Specialisation presents a unique way for practitioners to demonstrate their capabilities to the wider community in these important facets of the profession."**

**Richard Stewart, FCA**  
CA BV Specialist

## Choose your pathway to Business Valuation Specialisation

### Pathway 1

The specialisation program can be completed through postgraduate study if you have at least two years' business valuation experience, or by completing an online course and an assessment if you have at least four years' business valuation experience. The post graduate pathway offered through either Macquarie University or Kaplan. The online course is facilitated by Kaplan.



### Key dates

Check the [Chartered Accountants ANZ](https://www.caanz.com.au) website for up-to-date information on intake and enrolment dates.

#### Pathway 2 Accreditation process

- Review the entry requirements
- Pre-enrol with CA
- Receive Kaplan enrolment instructions from CA
- Enrol at Kaplan
- Successfully complete the course requirements
- Apply for recognition

"Being a Business Valuation Specialist has allowed me to demonstrate my capability and expertise which sets me apart from other practitioners. Particularly in the area of litigation support, where the credibility of a formal qualification provides additional weighting to my evidence in the courtroom. Being one of only a few BV Specialists in Western Australia has also resulted in referral opportunities from clients seeking an expert independent opinion for a wide range of purposes."

**Nadine Marke**

CA Business Valuation Specialist

## Entry Requirements and Pathway Details

### Pathway 1

#### Post Graduate Study

#### Eligibility

To be eligible for accreditation through Pathway 1 you must be a Chartered Accountant with at least two years of practical business valuation experience within the previous five years, where at least 20% of employment is specifically related to business valuation and an additional 20% is in an area closely related to business valuation.

#### Course Framework

You have a choice of studying through Macquarie University or Kaplan.

#### Enrol at Macquarie Business School

Successfully complete four mandatory subjects as part of the Graduate Diploma of Applied Finance at Macquarie Business School. The four subjects are:

- AFCP8101 Financial System, Participants and Instruments
- AFCP8102 Financial Structure and Insights
- AFCP8144 Business Valuation
- AFCP8142 Private Capital

#### Enrol with Kaplan

Successfully complete four mandatory subjects as part of the Graduate Diploma of Applied Finance through Kaplan including:

- FIN202 Fundamental of Asset Valuation (elective)
- FIN205 Business Valuation (elective)
- FIN280 Financial Modelling (elective)
- FIN290 Business Valuation Application (elective)

CAs are eligible for a number of credits as part of this qualification with Kaplan. These include:

- FIN103 Financial Analysis and Valuation (core)
- FIN342 Applied Corporate Finance (elective)
- Two (2) general electives (2x elective)

These credits should be discussed further with Kaplan.

You can apply for the specialisation accreditation after completing the identified subjects at the respective institution. You do not need to wait until receiving the qualification being undertaken at either Macquarie University or Kaplan. These subjects must be completed within 5 years prior to applying for CA Business Valuation Specialist recognition.

#### Course Fees

Macquarie University Graduate Diploma of Applied Finance

Estimated annual fee \$18,000

Duration: 1 year full time or equivalent part time

Kaplan Graduate Diploma of Applied Finance

Estimated course fee \$20 000

Duration: 1.25 year full time, or equivalent part time

## Pathway 2

### Online Course

#### Eligibility

To be eligible for accreditation through Pathway 2 you must be either a full Chartered Accountant or an Affiliate member with at least four years of practical Business Valuation experience within the last 10 years, where at least 20% of employment is specifically in business valuation and an additional 20% is in an area closely related to business valuation.

#### Course Framework

The Kaplan course is delivered online over 6 weeks. It includes the following modules:

Module 1: Contentious issues in valuations

Module 2: Regulatory environment and what needs to be in a report

Module 3: Financial reporting valuation

Module 4: Valuation of listed companies – minority and controlling interests

Module 5: Valuation of private companies

You must apply for recognition as a Business Valuation Specialist within 5 years of completing the online course.

#### Course Fees

Online course fee including cost of examination: A\$1350 incl. GST

If you prefer assessment by Portfolio Interview, the cost is an additional A\$450 incl. GST

#### Applying for recognition

When you have successfully completed the relevant education pathways for Pathway 1 or Pathway 2 and fulfilled the practical experience requirements you may apply for formal recognition.

#### Specialist application Fees

Application for specialist recognition: A\$232

(Applicants who have been declined will not be charged any fees)

Annual specialisation subscription fee: A\$273 incl. GST (pro-rata)

#### Ongoing obligations

To maintain your accreditation as a CA Business Valuation Specialist, you must ensure that at least 40% of your CPD requirement is undertaken in business valuation.

# Be a Difference Maker

## Find out more about the program

Read more about the Business Valuation Specialisation program and your pathway options.

### READ MORE

<https://www.charteredaccountantsanz.com/learning-and-events/specialisations/business-valuation>

## Register your interest

Simply complete the pre-enrolment form. You'll then receive further information about the program and what you'll need for enrolment.

### DOWNLOAD FORM

[charteredaccountantsanz.com/BusVal-ROI](https://www.charteredaccountantsanz.com/BusVal-ROI)

## Part of our growing suite of specialisation programs

Find out more about our full suite of programs that includes Business Valuation, Self-Managed Super Funds, Financial Planning and Forensic Accounting.

### VISIT SPECIALISATIONS PAGE

[charteredaccountantsanz.com/specialisations](https://www.charteredaccountantsanz.com/specialisations)

### For further information and enquiries

Phone: 1300 137 322

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