

Professional Accounting or Taxation Technician

★ Level 4

£ £8,000

📅 18 months

1. What the role entails

A Professional Accounting or Taxation Technician is responsible for creating, verifying and reviewing accurate and timely financial information for their organisation or for another organisation. This is in order to meet relevant ethical, professional and legal standards, and will use the individual's knowledge of the business systems and processes, as well as standard accounting and tax practices. The role may exist in an accounting practice, a professional services company, HMRC or the accounting function of a business or other organisation.

2. On-programme assessment

Before entering Gateway, the apprentice must complete the following on-programme assessment requirements:

- Professional exams and/or a work-based assessment
- Level 2 English and maths.

3. Gateway requirements

The employer, independent training provider (ITP) and apprentice make the decision to take the apprentice through Gateway. The apprentice must complete all of the on-programme elements before they enter Gateway, including a Portfolio of Evidence.



[View the full IfATE Professional Accounting/Taxation Technician standard](#)

4. End-point assessment

The end-point assessment (EPA) for Professional Accounting or Taxation Technician contains 2 methods of assessment:

Portfolio of Evidence including Reflective Statement

The Portfolio of Evidence demonstrates competence in the knowledge, skills and behaviours (KSBs) identified in the standard. The apprentice will gather these from practical experience in the workplace. They must then produce a Reflective Statement about this Portfolio, either through a written statement, presentation or structured discussion with an Independent End-Point Assessor (IEPA). Written statements should be 2000 words (+/- 10%) and presentation or discussion-based statements will last for one hour (+/- 10%).

Grade weighting – the Portfolio of Evidence with Reflective Statement is ungraded above a Pass. To be awarded a Pass, the apprentice must achieve competence in all KSBs requirements of the standard.

Role Simulation

Apprentices will be given pre-seen information about a fictitious organisation 4 weeks prior to the Role Simulation. On the day of the assessment, the apprentice will receive more information about the fictitious organisation and will be asked to complete a series of short tasks. We'll mark the Role Simulation out of 100 and this will last for 2 and a half hours.

Grade weighting – the Role Simulation is graded Pass, Fail or Distinction. The Pass mark for the Role Simulation is 70%. The apprentice must achieve a mark of 90% or higher to achieve a Distinction.

5. Grade aggregation table

Component	Grading		
Portfolio and Reflective Statement	If an apprentice fails any assessment, the EPA will be deemed an overall Fail	Pass	Pass
Role Simulation		Pass	Distinction
Final Grade	Fail	Pass	Distinction

6. Completion and certification

We'll activate certification once the apprentice has successfully completed all EPAs, and the IEPA has verified this. Working with the apprenticeship certificate issuing authority, we'll ensure the apprentice receives their certificate.

7. What next?

Completing the Professional Accounting or Taxation Technician EPA may lead to the apprentice receiving credits towards Chartered Accountancy/ Taxation qualifications provided by the relevant professional bodies. It may also result in credits being awarded towards relevant undergraduate degree programmes.

Why choose NCFE?

We're an approved End-Point Assessment Organisation (EPAO) specialising in EPA delivery across health, education and care, and business apprenticeship standards. We offer flexible and reliable EPA solutions supported by sector expertise, guidance documents and proactive service and support.