

**Firm Planning Board**

**Firm:** .....

**Registered Candidate Auditor Details:**

Name and Surname: .....  
 Registered Candidate Auditor number: .....  
 Date of ADP registration: .....

**Oversight RA Details:**

Name and Surname: .....  
 RA number: .....

Timeframe	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12	Month 13	Month 14	Month 15	Month 16	Month 17	Month 18
Clients	Client 1	Client 1	Client 2	Client 2	Client 3	Client 5	Client 5	Client 5	Client 6	Client 6	Client 7	Client 8	Client 1	Client 1	Client 2	Client 2	Client 3	Client 5
Roles	<b>Assistant Manager</b>						<b>Assistant Manager</b>						<b>Manager</b>					

**Guide on the preparation of the Planning Board:**

**Timeframe:**

The timeframe indicates the period (in months), the first 18 months after registration as an RCA. Please note that this template has been prepared for 18 months. However, it is understood that firms may prepare such planning on a six-monthly or yearly basis, in this regard the firm may submit their planning tools in their current form and send updates when applicable.

**Clients:**

This will list client that the Registered Candidate Auditor will be allocated to during the recorded period. The IRBA will not use the planning board in its assessments. The objective of the planning board is twofold; to determine the sufficiency of audit work and to manage the candidate's expectations.

**Roles:**

Under this section the firm must indicate the roles that the Registered Candidate Auditor is expected to perform at the planned clients. This could be achieved by stating the job designation that the Registered Candidate Auditor is expected to hold during this period. Should your planning tools not indicate the roles, the firm may submit this planning board accompanied with the relevant job description of the roles the candidate will be undertaking during the relevant planning period.