



The professional association for those  
who give and support financial advice

## Appendix A

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### CPD REQUEST FORM

- Complete and return by e-mail to [cpd@lia.ie](mailto:cpd@lia.ie) (Alternatively by post or fax – details below)
- We will give the activity due consideration and revert to you as soon as possible
- CPD requests will be dealt with in the order that they are received
- The event will be approved under the title given below, please reference this title on any future correspondence.
- Events must be approved for CPD hours in each calendar year.

**Please complete ALL Sections (state 'N/A' if a section does not apply)**

**(1) Please give a broad description of the event (e.g. Lecture, Seminar, Course, Training Programme etc)**

**(2) Company or Body organising the activity/event**

**(3) Subject Matter**

**(4) Title of proposed Activity/Event**

**(5) Designation Relevance**

Due to the importance that the Central Bank places on the relevance of CPD, LIA requires you to provide information in relation to the category(ies) for which CPD applies for this event. For convenience, we list below the categories of Retail Financial Products (1-8) as set out in the Central Bank's Minimum Competency Requirements Document.

- (1) Life Assurance
- (2) Pensions
- (3) Savings and Investment
- (4) Personal General Insurance
- (5) Commercial General Insurance
- (6) Private Medical Insurance and Associated Insurances
- (7) Housing Loans, Home Reversion Agreements and Associated Insurances
- (8) Consumer Credit and Associated Insurances

#### Specified Activities

1. Claims (a) Life assurance claims (b) Non life assurance claims
2. Reinsurance mediation
3. Direct management and supervision of accredited persons
4. Adjudicating on complaints



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**QFA & Bridge** = CPD hours for general insurance topics can only be claimed if a QFA also holds the Bridge Examination for General Insurance Policies

No.	Topics covered in Presentation	Category of Relevance ( Enter No. 1-8 from above list)	Duration of Topic

### **Important Notes on Claiming CPD Hours**

Please note that while QFAs, CPD Members and CUAs are entitled to attend all seminars and complete any module on the MyCPD website, members have the responsibility to ensure that events they attend or MyCPD modules they complete are relevant to the designation or category of membership they hold.

For example, CPD Members (i.e. “Grandfathered Individuals”) who are accredited in the “*Housing Loans & Associated Insurances*” category only (under the Financial Regulator’s MCR) should complete CPD relevant to the knowledge requirements set out for that category of product. While they are free to undertake CPD relevant to other categories of product e.g. topics relevant only to say, “*Savings and Investment, Pensions*” etc., they obviously do so for the purposes of advancing their knowledge in other areas of the industry and they should not include these CPD hours on their annual CPD Return. Likewise, QFAs should ensure they do not claim CPD for General Insurance Modules or events, unless they hold the Bridge Examination in General Insurance Policies.

Should LIA become aware of a member claiming CPD hours on their Annual Return for a presentation/seminar or MyCPD module which is not relevant to their designation or category of CPD membership, those hours will be removed from the member’s Annual return which could lead to a shortfall in CPD requirements and ultimately the removal of the member’s designation/accreditation.



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**(6) Could this Activity/Event be considered a Sales Pitch**

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**(7) State the target audience for this Activity/Event**

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**(8) Presenter/Tutor(s)**

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**(9) Venue(s)**

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**(10) Dates**

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**(11) Duration of Activity/Event (presentations and Q&A only)**

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**(12) Activity/Event Times**

Activity/Event Times	From	To
Event Start Time		
Coffee/Tea Break		
Lunch Break		
Afternoon Break		
Event End Time		

**(13) Any Other Relevant Information or Comments**

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### (14) **DISCLAIMER (please read and sign where indicated):**

I understand and accept that any CPD credit awarded for the above event/training programme will be based on the information I have submitted in relation to the duration of the presentation(s) and its/their content. Should either of these criteria change at any stage (e.g. presentations are shortened, content is altered, refreshment breaks incorporated), I will advise the LIA and re-apply for CPD credit. I also understand and accept that LIA's CPD Department will not stand over CPD hours awarded, where such changes have occurred **after** the award was given, and that they reserve the right to refuse CPD claims made by individuals attending an event that has been subject to such changes.

**Signed**

**Date**

**Your Name (please print)**

**Email Address**

**Daytime Phone Number**