

CPD ACCREDITATION REQUEST FORM

Important Information regarding CPD accreditation requests:

- If you have received approval for your event via Institute of Bankers or the Institute of Insurance you do not need to complete this form in full. Simply complete the following two fields:

Approved IOB or III number

Title of the event

- This form must be completed for all CPD events which are held externally to LIA.
- All applications must be made prior to commencement of the event, or in the case of online events, CPD accreditation must be applied for before these events go live.
- The content of CPD must be directly relevant to providing advice to consumers on retail financial products, which, in the context of the Minimum Competency Code, means that the content must be related to the knowledge requirements set out in the Minimum Competency Code for the categories of Retail Financial Product.
- Event durations must reflect the time awarded i.e., if an Accreditation Request states the duration to be 1 hour, then the event must have run for at least 1 hour excluding breaks/lunch.
- Following submission of this form, LIA will give the event and any related CPD applicable consideration and revert to you within 10 working days of receipt of this application.
- All applications must be made prior to commencement of the event, or in the case of online events, CPD accreditation must be applied for before these events go live.
- A late fee of €75 will be charged to applicants requesting CPD approval during December each year for an event that took place before December.
- Applicants will be requested to supply a copy of the course material e.g., slides, course outline, syllabus, agenda or the CD Rom (in the case of e-learning modules).
- Following the approval of any accreditation request, the organisers / presenters need to ensure that they provide their attendees with the accreditation number(s) so the members can record their attendance on their personal CPD Log.
- The content of CPD must be directly relevant to providing advice to consumers on retail financial products, which, in the context of the Minimum Competency Code, means that the content must be related to the knowledge requirements set out in the Minimum Competency Code for the categories of Retail Financial Product.
- Event durations must reflect the time awarded i.e., if an Accreditation Request states the duration to be 1 hour, then the event must have run for at least 1 hour excluding breaks/lunch.

Please complete all relevant sections of the CPD Accreditation form.

Company Name / Organiser

Title of Activity/Event

Topics

Broad description of the event/activity (seminar/e-learning/examination/webcast etc.)

Event Date(s)

Presenter/Tutor(s)

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

State the target audience for this Activity/Event

Could this Activity/Event be considered a Sales Pitch?

Any Other Relevant Information or Comments

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(s) 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 Code.

- (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
- or
- o Ethics
 - o Credit Union specific
 - o Debt Management

No.	Topics covered in Presentation	Category of Relevance (Enter No. 1-8 from above list) Credit Union, Ethics or Debt Management	Duration of Topic

	Section A: E-learning courses/modules	Section B: Webcasting and Tele/Video conferencing (and similar technologies)
1.	Please provide the web address or attach the CD Rom to allow LIA to review the course and related assessment:	1. Course delivered by (please tick) Webcast: Teleconference:
2.	Authors or designers of course/module	2. Is the course material transmitted live? (Please tick) Yes <input type="checkbox"/> No <input type="checkbox"/>
3.	Estimated time for learner to undertake the course/module: Excluding assessment: Including assessment:	3. Briefly describe the arrangements to ensure all candidates can: a) See and/or hear the presenter b) See the presenters' material
4.	How many questions are included in the total test Question Bank (should be greater than the test – see Q5 below)?	4. How can all participants put questions to and otherwise interact with the presenters/other participants?

Section A: E-learning courses/modules	Section B: Webcasting and Tele/Video conferencing (and similar technologies)
<p>5. How many questions were there in each test?</p>	<p>5. Can the organiser confirm attendance for the full duration for each participant i.e. can the organiser confirm log-in and log-out times for each participant?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>
<p>6. What is the pass mark for the test?</p> <p>_____ %</p>	<p>6. Is confirmation of attendance <u>for the full duration</u> available to each participant upon request?</p>
<p>7. How is confirmation of successful completion provided to learner?</p>	
<p>Section C: Please provide any additional information which you feel may be useful in assessing this event/course for CPD hours:</p>	

DISCLAIMER (please read and sign where indicated):

I understand and accept that any CPD credit awarded for the above event/training program will be based on the information I have submitted. Should any of the criteria change at any stage, I will advise 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: _____

Your name (please print): _____

Date of submission: _____

Email Address: _____

Daytime Phone Number: _____

Return to LIA by:

Email: cpd@lia.ie

Post: CPD Team, LIA House, 183 Kimmage Road West,
Dublin 12, D12 XD2X.