

An Example of a QFA Member Completing and Logging CPD

This member is a **QFA** and is accredited in five categories of Retail Financial Product (categories 1, 2, 3, 7 and 8), with 15 CPD hours in total to complete, of which:

- at least 1 hour must relate to **ethics**
- at least 1 hour must be relevant to each of the categories **1, 2, 3, 7 & 8**.

The Succession & Estate Planning module on MyCPD provides two CPD hours overall. This module is relevant to categories 1, 2 and 3. This member successfully completes this module and therefore earns two hours CPD against the overall requirement of 15 hours. As these two hours are relevant to categories 1, 2 and 3, this member has now met the 1-hour requirement in each of these categories by means of this one module.

This member now has 13 hours to complete for the year (15 less 2) of which at least 1 hour must be relevant to each of the remaining categories 7 and 8. They can satisfy the 1-hour requirement for category 7 and 8 by means of one event that is relevant to both categories or by two or more events relevant to the categories individually.

When the member has met the relevancy and ethics requirements, they can complete the remaining hours across any of the five categories in which they are accredited, to make up the overall 15-hour requirement.

Categories of Retail Financial Product:

	MCC Category		Designation Category
1.	Life Assurance	CU	Credit Union
2.	Pensions	DM	Debt Management
3.	Savings & Investments.	E	Ethics
4.	Personal General	PTP	PTP
5.	Commercial General Insurance		
6.	Private Medical and Associated Ins.		
7.	Housing Loans, Home Reversion etc.		
8.	Consumer Credit & Associated Ins.		

Please see below example of member's CPD log showing completion of the Succession and Estate Planning module on the MYCPD platform.

Competency	1	2	3	4	5	6	7	8	E	CU	DM	PTP	Total
Completed	2	2	2	0	0	0	0	0	0	2	0	0	2
Required	1	1	1	1	0	1	1	1	1	0	0	0	15
Total GAP	✓ 0	✓ 0	✓ 0	✗ 1	0	✗ 1	✗ 1	✗ 1	✗ 1	0	0	0	✗ 13

An Example of an APA Member Completing and Logging CPD

This member holds the APA in Household Insurance and Savings & Investments and is accredited in three categories of Retail Financial Product, categories 3, 7 and 8, with 15 CPD hours in total to complete, of which:

- at least 1 hour must relate to **ethics**
- at least 1 hour must be relevant to each of the categories **3, 7 & 8**.

The Housing Loans module on MyCPD provides two CPD hours overall. This module is relevant to category 7 only. The member successfully completes the module and therefore earns two hours CPD against the overall requirement of 15 hours. As these two hours are relevant to category 7, this member has met the 1-hour requirement in this category by means of completing this module.

They now have 13 hours to complete for the year (15 less 2) of which at least one hour must be relevant to each of categories 3 and 8. The member can satisfy the 1-hour requirement for category 3 and 8 by means of one event that is relevant to both categories or by two or more events relevant to the categories individually.

When the member has met the relevancy and ethics requirements, they can then complete the remaining hours across any of the three categories in which they are accredited to make up the overall 15-hour requirement.

Categories of Retail Financial Product:

	MCC Category		Designation Category
1.	Life Assurance	CU	Credit Union
2.	Pensions	DM	Debt Management
3.	Savings & Investments	E	Ethics
4.	Personal General	PTP	PTP
5.	Commercial General Insurance		
6.	Private Medical and Associated Ins.		
7.	Housing Loans, Home Reversion etc.		
8.	Consumer Credit & Associated Ins.		

Please see below example of the member's CPD log showing completion of the Housing Loans module on the MYCPD platform.

Competency	1	2	3	4	5	6	7	8	E	CU	DM	PTP	Total
Completed	0	0	0	0	0	0	2	0	0	2	0	0	2
Required	0	0	1	0	0	0	1	1	1	0	0	0	15
Total GAP	0	0	✗ 1	0	0	0	✓ 0	✗ 1	✗ 1	0	0	0	✗ 13

An Example of a CUA Member (with the QFA) Completing and Logging CPD

This member holds the **QFA & CUA** designations and are accredited in six categories of Retail Financial Product, categories 1, 2, 3, 7, 8 & CU (CU = Credit Union category) with 15 CPD hours in total to complete, of which:

- at least 1 hour must relate to **ethics**
- at least 1 hour must be relevant to each of the categories **1, 2, 3, 7, 8 & CU**.

The Housing Loans module on MyCPD provides two CPD hours overall. This module is relevant to category 7 and the Credit Union category. The member successfully completes the module and therefore earns two hours CPD against the overall requirement of 15 hours. As these two hours are relevant to category 7 and the Credit Union category, the member has met the 1-hour requirement in these categories by means of completing this module.

They now have 13 hours to complete for the year (15 less 2) of which at least 1 hour must be relevant to each of categories 1, 2, 3 and 8. The member can satisfy the 1-hour requirement for category 1, 2, 3 and 8 by means of one event that is relevant to all four categories or by four or more events relevant to the categories individually.

When all the 1-hour per category and ethics requirements have been met, the member can complete the remaining hours (to make up the overall 15-hour requirement) across any of the six categories in which they are accredited.

Categories of Retail Financial Product:

	MCC Category		Designation Category
1.	Life Assurance	CU	Credit Union
2.	Pensions	DM	Debt Management
3.	Savings & Investments	E	Ethics
4.	Personal General	PTP	Pension Trustee Practitioner
5.	Commercial General Insurance		
6.	Private Medical and Associated Ins.		
7.	Housing Loans, Home Reversion etc.		
8.	Consumer Credit & Associated Ins.		

Please see below example of the member's CPD log having completed the housing loans module on the MYCPD platform.

Competency	1	2	3	4	5	6	7	8	E	CU	DM	PTP	Total
Completed	0	0	0	0	0	0	2	0	0	2	0	0	2
Required	1	1	1	0	0	0	1	1	1	1	0	0	15
Total GAP	✗ 1	✗ 1	✗ 1	0	0	0	✓ 0	✗ 1	✗ 1	✓ 0	0	0	✗ 13

An Example of a CUA Member Completing and Logging CPD

This member holds the **CUA** designation and is accredited in the Credit Union category with 15 CPD hours in total to complete, of which at least 1 hour must relate to **ethics** with the remainder relevant to the Credit Union category.

The Housing Loans module on MyCPD provides two CPD hours overall. This module is relevant to the Credit Union category. The member successfully completes the module and therefore earns two hours CPD against the overall requirement of 15 hours. As these two hours are relevant to the Credit Union category, this member has now met the 1-hour requirement in the Credit Union category by means of completing this module.

They now have 13 hours to complete for the year (13 less 2) relevant to the Credit Union category.

Categories of Retail Financial Product:

	MCC Category		Designation Category
1.	Life Assurance	CU	Credit Union
2.	Pensions	DM	Debt Management
3.	Savings & Investments	E	Ethics
4.	Personal General	PTP	Pension Trustee Practitioner
5.	Commercial General Insurance		
6.	Private Medical and Associated Ins.		
7.	Housing Loans, Home Reversion etc.		
8.	Consumer Credit & Associated Ins.		

Please see below example of the member's CPD log who has completed the housing loans module on the MYCPD platform.

Competency	1	2	3	4	5	6	7	8	E	CU	DM	PTP	Total
Completed	0	0	0	0	0	0	2	0	0	2	0	0	2
Required	0	0	0	0	0	0	0	0	1	1	0	0	15
Total GAP	0	0	0	0	0	0	0	0	✗ 1	✓ 0	0	0	✗ 13

An Example of a CUC Member (with the QFA) Completing and Logging CPD

This member holds the **QFA & CUC** designations and is accredited in 6 categories of Retail Financial Product, categories 1, 2, 3, 7, 8 & CU, (CU = Credit Union category), with 15 CPD hours in total to complete, of which:

- at least 1 hour must relate to **ethics**
- at least 1 hour must be relevant to each of the categories **1, 2, 3, 7, 8 & CU**.

The Housing Loans module on MyCPD provides two CPD hours overall. This module is relevant to category 7 and Credit Union. This member successfully completes the module and therefore earns two hours CPD against the overall requirement of 15 hours. As these two hours are relevant to category 7 and CU, they have now met the 1-hour requirement in these categories by means of completing this module.

The member now has 13 hours to complete for the year (15 less 2) of which at least 1 hour must be relevant to each of categories 1, 2, 3 and 8. They can satisfy the 1-hour requirement for category 1, 2, 3 and 8 by means of one event that is relevant to all four categories or by four or more events relevant to the categories individually.

When all of the member's 1-hour per category and ethics requirements have been met, they can complete the remaining hours (to make up the overall 15-hour requirement) across any of the 6 categories in which the member is accredited.

Categories of Retail Financial Product:

	MCC Category		Designation Category
1.	Life Assurance	CU	Credit Union
2.	Pensions	DM	Debt Management
3.	Savings & Investments	E	Ethics
4.	Personal General	PTP	Pension Trustee Practitioner
5.	Commercial General Insurance		
6.	Private Medical and Associated Ins.		
7.	Housing Loans, Home Reversion etc.		
8.	Consumer Credit & Associated Ins.		

Please see below example of a member's CPD log who has completed the housing loans module on the MYCPD platform.

Competency	1	2	3	4	5	6	7	8	E	CU	DM	PTP	Total
Completed	0	0	0	0	0	0	2	0	0	2	0	0	2
Required	1	1	1	0	0	0	1	1	1	1	0	0	15
Total GAP	✗ 1	✗ 1	✗ 1	0	0	0	✓ 0	✗ 1	✗ 1	✓ 0	0	0	✗ 13

An Example of a CUC Member Completing and Logging CPD

This member holds the **CUC** designation and is accredited in the Credit Union category with 6 CPD hours in total to complete, of which at least 1 hour must relate to the **Credit Union category**.

The Housing Loans module on MyCPD provides two CPD hours overall. This module is relevant to the Credit Union category. The member successfully completes the module and therefore earns two hours CPD against the overall requirement of 6 hours. As these two hours are relevant to the Credit Union category, the member has now met the 1-hour requirement in the Credit Union category by means of completing this module.

They now have four hours (6 less 2) to complete for the year relevant to the Credit Union category.

Categories of Retail Financial Product:

	MCC Category		Designation Category
1.	Life Assurance	CU	Credit Union
2.	Pensions	DM	Debt Management
3.	Savings & Investments	E	Ethics
4.	Personal General	PTP	Pension Trustee Practitioner
5.	Commercial General Insurance		
6.	Private Medical and Associated Ins.		
7.	Housing Loans, Home Reversion etc.		
8.	Consumer Credit & Associated Ins.		

Please see below example of a member's CPD log who has completed the housing loans module on the MYCPD platform.

Competency	1	2	3	4	5	6	7	8	E	CU	DM	PTP	Total
Completed	0	0	0	0	0	0	2	0	0	2	0	0	2
Required	0	0	0	0	0	0	0	0	0	1	0	0	6
Total GAP	0	0	0	0	0	0	0	0	0	✓ 0	0	0	✗ 4

An Example of a PTP Member (with the QFA) Completing and Logging CPD

This member holds the **QFA & PTP** designations, and is accredited in 6 categories of Retail Financial Product, categories 1, 2, 3, 7, 8 & PTP, with 15 CPD hours in total to complete, of which:

- at least 1 hour must relate to **ethics**
- at least 1 hour must be relevant to each of the categories **1, 2, 3, 7, 8 & PTP**

The Succession & Estate Planning module on MyCPD provides two CPD hours overall. This module is relevant to categories 1, 2 and 3. This member successfully completes this module and therefore earns two hours CPD against the overall requirement of 15 hours. As these two hours are relevant to category 1, category 2 and category 3, the member now has now met the requirement in each of these categories by means of this one module.

They now have 13 hours to complete for the year (15 minus 2) of which at least 1 hour must be relevant to each of categories 7 and 8 and the PTP category. This member can satisfy the 1-hour requirement for category 7, 8 and PTP by means of one event that is relevant to all three categories or by three or more events relevant to the categories individually.

When all of 1-hour per category and ethics requirements have been met, the member can complete the remaining hours (to make up their overall 15-hour requirement) across any of the 6 categories in which they are accredited.

Categories of Retail Financial Product:

	MCC Category		Designation Category
1.	Life Assurance	CU	Credit Union
2.	Pensions	DM	Debt Management
3.	Savings & Investments	E	Ethics
4.	Personal General	PTP	Pension Trustee Practitioner
5.	Commercial General Insurance		
6.	Private Medical and Associated Ins.		
7.	Housing Loans, Home Reversion etc.		
8.	Consumer Credit & Associated Ins.		

Please see below example of a member's CPD log who has completed the housing loans module on the MYCPD platform.

Competency	1	2	3	4	5	6	7	8	E	CU	DM	PTP	Total
Completed	2	2	2	0	0	0	0	0	0	2	0	0	2
Required	1	1	1	0	0	0	1	1	1	0	0	1	15
Total GAP	✓ 0	✓ 0	✓ 0	0	0	0	✗ 1	✗ 1	✗ 1	0	0	✗ 1	✗ 13

An Example of a PTP Member Completing and Logging CPD

This member holds the **PTP** designation and is accredited in the Pensions Trustee Category with 6 CPD hours in total to complete which all need to be relevant to the PTP competency (categories 2, 3 & PTP).

The Disclosure of Information module on MyCPD provides one CPD hour overall. This module is relevant to categories 2 and the PTP category. This member successfully completes this module and therefore earns 1 hour CPD against the overall requirement of 6 hours. As this one hour is relevant to category 2 and category PTP, they have now met the one-hour requirement in each of category 2 & PTP by means of this one module.

The member now has 5 hours to complete for the year (6 less 1) of which at least one hour must be relevant to category 3. They can satisfy the one-hour requirement for category 3 by means of one event that is relevant to this category.

When all of the 1-hour per category requirements have been met, the member can complete their remaining hours (to make up her overall 6-hour requirement) across any of the three categories in which they are accredited.

Categories of Retail Financial Product:

	MCC Category		Designation Category
1.	Life Assurance	CU	Credit Union
2.	Pensions	DM	Debt Management
3.	Savings & Investment	E	Ethics
4.	Personal General	PTP	Pension Trustee Practitioner
5.	Commercial General Insurance		
6.	Private Medical and Associated Ins.		
7.	Housing Loans, Home Reversion etc.		
8.	Consumer Credit & Associated Ins.		

Please see below example of a member's CPD log who has completed the housing loans module on the MYCPD platform.

Competency	1	2	3	4	5	6	7	8	E	CU	DM	PTP	Total
Completed	0	1	0	0	0	0	0	0	0	0	0	0	1
Required	0	1	1	0	0	0	0	0	0	0	0	1	6
Total GAP	0	✓ 0	✗ 1	0	0	0	0	0	0	0	0	✗ 1	✗ 5