

Annual PTP CPD Requirements

- Every PTP member is obliged to complete the same amount of CPD hours, irrespective of the area of business or the industry in which they are employed or the number of product categories they are accredited in.
- The CPD year is based on a calendar year i.e. 1st January – 31st December which means you must have all your CPD hours completed within the calendar year for that same year.
- The annual requirement for PTP members who are Lay Trustees with no existing LIA designation is 6 hours in areas relevant to your PTP designation, i.e. Trusteeship, Savings/Investments and Pensions. In this regard, at least 1 hour must be in each of these categories with the remaining 3 hours across any of these three categories.
- The annual requirement for PTP members with an existing LIA designation/CPD requirement will remain unchanged at 15 hours, but 6 hours of that 15 must be relevant to the PTP designation. In this regard, at least 1 hour must be in each of the categories Trusteeship, Savings/Investments and Pensions, with the remaining 3 hours across any of these three categories. To see the total number of hours required for the year, please log in and view your CPD log - [click here to log in](#).
- Members must complete at least one hour of CPD each year relevant to each category of product in which they are accredited and at least one hour of CPD in Ethics. To see your categories of accreditation, please log in to view your CPD log - [click here to log-in](#).
- Should you earn your first LIA designation from term 1 (January exams) or term 2 (May exams) in any given year, your CPD requirement will be 4 hours for that year and no Ethics or relevancy requirements will apply in year one. This will increase to the full annual requirement for the following year.
- Should you earn your first LIA designation from term 3 (September exams) in any given year, your CPD requirement will be 0 hours for that year. CPD hours can be completed but an annual return submission is not required. This will increase to the full annual requirement for the following year.
- Each subsequent successful LIA exam will award you 8 hours CPD which will be automatically logged for you. This may count towards the overall total number of CPD hours required for that year, but it does not count towards any relevancy requirements.
- CPD must be directly relevant to providing advice to retail consumers under the Central Bank's Minimum Competency Code - [click here to log in and view/download](#).
- Members must record details of all events for which CPD hours are being claimed and make an annual return by 31st January the following year.
 - CPD completed with LIA is automatically added to your CPD log on successful completion.
 - All external CPD events must be accredited by LIA. If approved for CPD, you will be provided with an accreditation number which you can then add to your CPD log.
- LIA will select a random sample of CPD returns each year during March/April for audit. If you are selected for audit, you will receive a communication outlining the requirements in relation to this.

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

John holds the **QFA & PTP** designations. John is accredited in 6 categories of Retail Financial Product (categories 1, 2, 3, 7, 8 & PTP).

John has 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. John 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, John has now met the requirement in each of these categories by means of this one module.

John now has 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, as John has not yet met the 1-hour requirement for these categories. John 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 John's 1-hour per category and ethics requirements have been met, John can complete the remaining hours (to make up his overall 15-hour requirement) across any of the 6 categories in which he 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 CPD log for John 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

Mary holds the **PTP** designation. Mary is accredited in the Pensions Trustee Category.

Mary has 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. Mary 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, Mary has now met the one-hour requirement in each of category 2 & PTP by means of this one module.

Mary now has 5 hours to complete for the year (6 less 1) of which at least one hour must be relevant to category 3, as Mary has not yet met the one-hour requirement for this category. Mary can satisfy the one-hour requirement for category 3 by means of one event that is relevant to this category.

When all of Mary's one-hour per category requirements have been met, Mary can complete her remaining hours (to make up her overall 6-hour requirement) across any of the three categories in which she is 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 CPD log for Mary 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

Ways of obtaining CPD hours with LIA

MyCPD online

Exclusive to LIA members, the MyCPD Platform provides free access to lecture-style CPD modules.

Accessible online 24/7/365, MyCPD provides you with total flexibility as to where and when you can update your knowledge and obtain CPD hours across all MCC categories.

Start increasing your knowledge now:

[Access the MyCPD Platform](#)

Following successful completion of a MyCPD module, your CPD hours will log automatically to your CPD log.

CPD Live events

LIA runs live CPD events each month. These include live online & physical CPD events.

Over the course of the year, our CPD events cover all MCC categories, providing you with a great way to update your knowledge and to meet your annual CPD requirements.

Start increasing your knowledge now:

[Book your next CPD Event](#)

Once an event is attended for its full duration, the CPD hours will be logged to your record within a couple of days.

CPD Annual Update

The CPD Annual Update is available to download from your Reference Library from September each year. This manual covers issues and developments relevant to the provision of financial advice by accredited persons.

By reading and assimilating the Annual Update, you can claim up to 4 CPD hours, relevant to all 8 categories of retail financial products, and to those holding LIA Credit Union designations.

To access the CPD Annual Update:

- Click here to access the LIA reference Library
- Select the 'Annual Update Manual' from the menu and proceed to download this manual.
- Upon completion of reading and assimilating this manual, you must log the associated CPD Accreditation Code to your CPD log.

CPD from external Sources

Certain external events may also qualify for CPD hours:

If you have attended an event which has an LIA accreditation number (e.g. LIAXXXXX_2022) it has been successfully approved by LIA for CPD and you can log these hours on your CPD record.

If you do not have an accreditation number, please contact the event organiser/speaker who may seek CPD approval from LIA.

If the event you have attended has been approved by IOB or The Insurance Institute, please email the relevant accreditation code to cpd@lia.ie and we will confirm LIA's equivalent code which you can then add to your CPD record.

How to submit your annual return

1. Click [Here](#) to log into the membersarea.
2. Once you are signed in you can now access your CPD log and submit your CPD Annual Return. There are two ways to do this:
 - A) On your dashboard click 'Submit Annual Return'. This will bring you to the current year's CPD log.
 - B) Or you can select the 'Log CPD' option from the CPD resources tab on the top menu.
3. Check that all your relevant CPD hours have been logged. If not, you can continue to add additional hours up until the submission deadline.
4. Scroll to the end of the page and click 'Submit' as shown below.

Submit Annual Return

By submitting this Annual Return, I accept LIA's Privacy Policy and Terms & Conditions. LIA's Terms & Conditions can be viewed here: [LIA Terms & Conditions](#).

SUBMIT

5. You will receive an automated email to confirm that your return has been submitted.
6. After your return has been submitted, you can continue to complete CPD until December 31st. You can continue logging CPD hours until January 31st of the following year provided the CPD hours were completed during the previous year.
7. To add additional hours after your return has been submitted, add a CPD code as indicated and click 'Resubmit' at the end of the page. This will update the CPD return.
8. The Annual Return submission period closes on January 31st each year. Once the submission period has closed, you will receive a CPD Compliance report for the CPD year outlining the details of your return and confirming your compliance or otherwise.

Submit Annual Return

By submitting this Annual Return, I accept LIA's Privacy Policy and Terms & Conditions. LIA's Terms & Conditions can be viewed here: [LIA Terms & Conditions](#).

RE-SUBMIT