

CPD and development plans

Each adviser's annual plan, CPD activities and evidence, with manager review and sign-off.

Extra tool for financial advice firms

What it is for

Records each adviser's yearly learning plan and progress, who signs it off, and the firm's own yearly review of its procedures, systems and expertise. Extra tool for financial advice firms.

How to use it

1 Add the advisers

As administrator, on the **Overview** tab enter the adviser's name, role, email and FSPR number if they have one, then select **Add adviser**. Open the adviser to add who they report to, their qualifications and any industry-body targets.

2 Plan the year

Each adviser sets goals in the **Development plan (PDP)** tab and selects **Submit plan for sign-off**.

3 Manager signs off

The manager selects **Sign off this plan**, or **Return for changes** with comments.

4 Log CPD as it happens

On the **CPD log** tab, select **Add entry** to log an activity, and add its evidence. One hour counts as one point, in half-point steps, to show progress.

5 Check for gaps

The **Exception report** on the Overview tab shows what is missing or behind.

6 Close the year

Complete the firm's own yearly review. At year end the manager selects **Sign off and lock the year**.

Before you start

- Know when your CPD year starts and set it under **Your CPD year starts in**.
- Decide who signs off each adviser. Add managers under **Reviewers and links**.

Good habits

- Keep each CPD year's records for as many years as you decide under **Certificates and record keeping**.
- Send adviser and manager links by email or copy them.
- The points are a guide only. They are not a compliance rating.

How you sign in

Opens with your private link. No password to manage.

Verfapp supports your compliance. It does not certify it, and it is not legal advice. Screens shown use sample data.

Need a hand?

We are happy to walk you through it.

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