

CPD ACCREDITATION REQUEST FORM

Please note

- This form must be completed for all CPD events held externally to FPSB Ireland Ltd e.g. required for all in-company training and events attended outside of FPSB Ireland Ltd.
- We will give the activity due consideration and revert to you within 10 working days of receipt of the application.
- CPD requests will be dealt with in the order that they are received.
- Applicants are requested to supply a copy of the course material e.g. presentation slides, course outline, syllabus, agenda.
- Events must be approved for CPD hours in each calendar year. Events should be re-submitted if running in a new CPD year.
- The content of CPD hours 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 in respect of which the QFA designation is recognised.

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

(1) Please give a broad description of the event (e.g. Seminar/Training event, E-Learning courses/modules, Examination (Qualification) etc)

(2) Company or Body organising the activity/event

(3) Subject Matter

(4) Title of Activity/Event

(5) Designation Relevance

FPSB Ireland Ltd 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) 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

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

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

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

(8) Presenter/Tutor(s)

(9) Venue(s)

(10) Dates

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

(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

(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, re-refreshment breaks incorporated), I will advise FPSB Ireland Ltd and re-apply for CPD credit. I also understand and accept that FPSB Ireland Ltd CPD Committee 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 of enquiry:

Your Name (please print):

Certification Number:

Email Address:

Daytime Phone Number:

Return to FPSB Ireland Ltd by:

Email: terrie.kennedy@fpsb.ie

Fax: 01 – 4554530

Post: Terrie Kennedy, FPSB Ireland Ltd, 185a Kimmage Road West, Dublin 12.