



**Please note**

- This form must be completed for all CPD events held externally to FPSB Ireland DAC e.g. required for all in-company training and events attended outside of FPSB Ireland DAC.
- 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 or CD Rom in the case of e-learning modules.
- 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.
- 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 Sections (indicating 'N/A' if a section does not apply)**

<b>SECTION 1 – Event Details</b>
<b>Company Name / Organiser</b>
<b>Event Date(s) &amp; Venue(s)</b>
<b>Duration of Activity/Event (presentations and Q&amp;A only)</b>
<b>Title of Activity/Event</b>
<b>Presenter/Tutor(s)</b>
<b>Topics</b>
<b>Broad description of the event/activity (seminar/e-learning/examination/webcast etc)</b>
<b>State the target audience for this Activity/Event</b>
<b>Could this Activity/Event be considered a Sales Pitch?</b>



Activity/Event Times	From	To
Event Start Time		
Coffee/Tea Break		
Lunch Break		
Afternoon Break		
Event End Time		
<b>Any Other Relevant Information or Comments</b>		
<b>SECTION 2 – applicable to <i>online</i> delivery only</b>		
<b>E-learning courses/modules</b>		<b>Webcasting, Tele/Videoconferencing and similar technologies</b>
1	Please provide the web address or attach the CD Rom to enable review of content & related assessment	Course delivered by:
		Webcast <input type="checkbox"/> Teleconference <input type="checkbox"/>
2	Authors or designers of course/module	Is the course material transmitted live?
		Yes <input type="checkbox"/> No <input type="checkbox"/>
3	Estimated time for learner to undertake the course/module Excluding assessment	Describe briefly the arrangements to ensure all candidates can:
		See and/or hear the presenter
	Including assessment	See the presenters' material
4	How many questions in the total test Question Bank? ( <i>should be greater than the test – see Q5 below</i> )	How can all participants put questions to and otherwise interact with the presenters/other participants?
5	How many questions in each test?	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?
		Yes <input type="checkbox"/> No <input type="checkbox"/>
6	What is the pass mark? (%)	Is confirmation of attendance <u>for the full duration</u> available to each participant upon request?
		Yes <input type="checkbox"/> No <input type="checkbox"/>
7	How is confirmation of successful completion provided to learner?	

### SECTION 3 - Designation Relevance

FPSB Ireland DAC 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

### SECTION 4 - Disclaimer

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, refreshment breaks incorporated), I will advise FPSB Ireland DAC and re-apply for CPD credit. I also understand and accept that FPSB Ireland DAC 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	
Your Name (please print)	
Date of Submission	
Email Address	
Contact Number	

#### Return to FPSB Ireland DAC by:

Email: [cpd@fpsb.ie](mailto:cpd@fpsb.ie)

Post: FPSB Ireland DAC, 185a Kimmage Road West, Dublin 12.