

CPD Essentials: learning content

CPD Essentials has been created to provide 35 hours of relevant CPD content.

For ease of reference this is split across six key subject areas. Within these there are 28 individual e-briefing programmes.

Financial services, regulation and ethics

- Structure of financial services
- Legal concepts
- Regulatory principles
- Regulatory practice
- Ethics

Investment principles and risk

- Asset classes
- Theory and performance
- Investment products
- Investment advice and planning

Personal taxation

- Taxes on income
- Taxes on capital
- Overseas aspects of tax
- Inheritance tax
- Tax planning – general

Pensions and retirement planning

- Economic and legal context
- State pension scheme
- Defined benefit schemes
- Defined contribution schemes
- Retirement planning

Financial protection

- The context of protection
- Life assurance
- Health insurance
- Long term care
- Protection planning

Financial planning practice

- Fact-finding
- Analysis
- Formulating the plan
- Implementation and reviewing

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