FINANCIAL ADVISORY LAUNCH PROGRAMME · GET YOUR QUALIFICATIONS AND STATEMENT OF PROFESSIONAL STANDING IN ORDER

Qualification and SPS tracker

Your diploma units, your SPS body, and an annual CPD log with the 35 and 21-hour split built in.

01 Your qualification

Track each unit to completion. You need the full diploma, not a partial.

Which Level 4 diploma are you taking (CII Diploma in Regulated Financial Planning, LIBF DipFA, CISI Diploma)?

Units and credits: which are passed, which remain? (The CII version is R01 to R06, 100 credits.)

Any additional qualification your specialisms require, and its status?

02 Your Statement of Professional Standing

The accredited body issues and governs the SPS. Follow its current requirements.

Which FCA-accredited body issues your SPS (CII/PFS, CISI, LIBF)?

Issue date and annual renewal date?

03 Your annual CPD log

A minimum of 35 hours a year, of which at least 21 must be structured. This keeps the SPS live.

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Structured CPD hours logged this year (target: at least 21)

Unstructured CPD hours logged this year

Total hours against the 35-hour minimum, and hours remaining

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