



CPD RECORD: FINANCIAL CONTROLLER EXAMPLE

As part of your Annual Return, ICAS ask you to self-certify that you have met your CPD requirements for that year through undertaking 'The ICAS Professional Development Process'. This process is something that you will probably be doing to some extent anyway, either mentally or as part of your organisation's annual performance review process.

If selected for monitoring purposes, you will be asked to send in your CPD record for review by ICAS. Your CPD record can be in any format but we recommend this pro-forma CPD planning and recording document to help you plan your CPD activities and record your progression through ICAS' Professional Development Process. A copy of this document is also available from the ICAS website [here](#).

Personal Details

Full Name <i>Ms Controller</i>	Membership ID <i>MXXXXX</i>
CPD YEAR : 2025	

STEP 1- Define current and future role(s)

What is expected of you in your current role?
You may like to consider the expectations being placed upon you by employers, clients, colleagues, regulators and the public, and your ethical obligations to them. Consideration can be given to your future career options and goals.

As finance accountant in a small manufacturing company I am responsible for conducting the following roles in an ethical and professional manner:

- Assisting the Financial Director with financial strategy assistance, business plans, forecasting*
- Financial reporting to prepare accounts for shareholders showing a true and fair view- preparing consolidated group accounts*
- Liaising with external auditors*
- Management accounts reporting and analysis for Finance Director*
- Keeping adequate financial records & books*
- Responsibility for certain HR aspects – reporting to Finance Director*
- Project management and accounting*

STEP 2 – Decide on your training and development needs

What skills and knowledge do you need to maintain or develop to meet these expectations and what training gaps have you identified as a result? This could include personal as well as technical skills, especially if you manage others.

You are encouraged to carry out this assessment at the start of the year but this assessment is expected to be ongoing to take into account any changes in role, organisation or business environment.

- *Up to date technical knowledge of UK accounting standards, taxation and company law*
- *Ability to conduct financial analysis*
- *Comprehensive understanding of accounting software and appropriate use of AI*
- *Knowledge of staff handbook and main employment law requirements*
- *Knowledge of project management - I am about to embark on a large IT project at the start of 2025 and would like to know more about project management and cybersecurity issues*
- *Commercial awareness - changing economic and external business factors – these are tough times and I would like to do more to support FD in financial management role*
- *General management ability, personal interaction/empathy*
- *Sustainability requirements and best practice in the industry*

STEP 3- Identifying CPD activities

How will you address your development needs? You are encouraged to use this section of the record to diary or list the CPD activities you are aiming to undertake throughout the year.

A wide range of activities can be recognised for CPD purposes and is recommended. If you can identify a meaningful learning outcome from a particular activity then it will be valid for CPD purposes

This year I want to concentrate on:

- *Building understanding of what is going on commercially in the industry by attending industry conference FRS102 & tax updates*
- *Project management training*
- *Employment law updates*
- *Business and general media and CA magazine reading*
- *Ethics training using resources on ICAS website*
- *Understand more about sustainability in our industry and what others are doing*
- *Training on use of AI in the finance function and wider in industry*

STEP 4 – Reflect and Record

This section of the record should be used to record when you have undertaken a CPD activity.

For each activity, what were the key learning points? How have you applied them? How do they address your needs listed in Step 2?

<i>Date added</i>	<i>Date completed</i>	<i>Activity</i>	<i>Outcome</i>
7/1/2025	30/04/2025	Industry conference	Worthwhile and increased commercial awareness
7/1/2025	20/12/2025	Accountancy Age. CA magazine, Director magazine, ICAS website	Helped keep me technically and commercially up to date
31/3/2025	10/12/2025	Business Network – two local events	Increased understanding of economy on local business
7/4/2025	10/12/2025	Employment law updates on gov.uk website. Wellbeing at work course	Maintain knowledge of employment law to ensure up to date with doing HR aspects of job. Course improved understanding of wellbeing in the work place for self and staff
08/09/2025	10/09/2025	UK GAAP updates including FRS 102 update webinar	Kept up to date with accounting and financial reporting developments
10/01/25	10/11/2025	Tax update course and HMRC webinars	Ensured tax knowledge maintained
30/11/2025	6/12/2025	Project management software	Received in house training on use of project management software – will be very useful as I will be involved in a couple of IT projects within the next year
30/11/2025	6/12/2025	Project management course	Received training in project management techniques – found very useful to help plan project steps and key deliverables and key costings
Jan 25	Dec 25	Ethics updates on ICAS website including reading ethics code and ethical case studies	Challenged my thinking about ethics and pressures that I may come under in business



<i>07/11/25</i>	<i>07/11/25</i>	<i>Webinar on sustainability in our industry and what the standards are now</i>	<i>Improved my understanding of what is expected in terms of sustainability and how we can meet our sustainability goals as a business</i>
<i>Jan 25</i>	<i>Dec 25</i>	<i>AI and cybersecurity training at work to understand the company policies. Read the AI and tech area of ICAS website</i>	<i>Updated my tech understanding to enable me to use AI in my job in a secure way and to understand the importance of cybersecurity to keep data safe</i>

In summary, what were the most important things you learned last year? What were the tangible outcomes of these for your business?

- *Better understanding of the economic conditions, risks, and competitor analysis. How to achieve better financial management of our company in tough times*
- *Importance of developing staff*
- *Better project management knowledge for my upcoming IT project*
- *Kept technically up to date and continue to be aware of the importance of cybersecurity and how to use AI appropriately*