



CPD RECORD – CORPORATE FINANCE EXPERT

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: Corporate Finance Expert	Membership ID MXXXXX
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.

I run my own accountancy practice specialising in providing corporate finance advice to a variety of clients. My responsibilities include helping clients raise finance and consider what sources of funding are available. I also advise on capital structure and help companies increase the value of the business. I also help clients prepare business plans and review projections. I require a detailed knowledge of the various industries that my clients operate in and much of my training is specific to the needs of my clients. The nature of the work varies from year to year.

In addition to the activities mentioned above, I also sit on several boards as a non-executive director and so my accounting and taxation knowledge needs to be up to date, although general in nature. In these cases, the clients also have external accountants to provide specific accounting and taxation advice.

As a CA, I am expected to act with integrity and therefore I must be mindful of the ethical implications at all times.

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.

I need to ensure I am aware of the challenges facing my clients and the industries they operate in.

I would like some formal training covering acquisitions, as this is an area I have not been involved in for some time and there are a few opportunities on the horizon.

I need to make sure I stay up to date with any developments in financial reporting and tax, although my knowledge in these areas does not need to be detailed as most clients have external accountants to advise them.

As a sole practitioner, I need to ensure compliance with the anti-money laundering requirements. I also want to ensure I am up to date with cybersecurity considerations.

I have a DPB licence from ICAS and must ensure that the work undertaken does not stray into areas that I am not authorised to undertake.

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

Courses:

5 March 2025: General Tax update (half day face to face course by external provider)

30 April 2025: Mergers and Acquisitions (full day face to face course by external provider)

10 May 2025: Cybersecurity course

Webinars:

Jan and Nov 2025: Budget summaries

25 November 2025: Money Laundering Update (Webinar)

Other CPD activity involves attending board meetings, meeting with external auditors; reading technical and business material to ensure knowledge stays up to date and that I continue to understand the requirements of my DPB licence

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?

Courses:

5 March 2025: General Tax update (half day face to face course by external provider)

Useful course to get an understanding of the updates to tax and what needs to be considered this year and next

30 April 2025: Mergers and Acquisitions (full day face to face course by external provider)

Helpful course to review some of the processes and issues involved in acquisitions and disposals of UK companies as well as meet others involved in this work.

10 May 2025: Cybersecurity (full day course by external provider)

An update on what to watch out for and how to protect my business as well as what to look out for when considering clients and their risks

Webinars:

Jan and Nov 2025: Review of the Budgets (Webinar)

A good summary of the key points of the Budgets which allows me to talk knowledgeably to clients about upcoming changes relevant to their businesses

November 2025 : Money Laundering Update (Webinar)

Useful update on AML requirements and what to look out for especially when taking on new clients and what to consider when working with clients in higher risk industries.

Through 2025: Ethical updates

Reviewed the ICAS ethical code as well as some of the other ethics resources on the ICAS website to make sure I was aware of updates, what is available and who I could speak to if I had an ethical dilemma

Other:

I attended around 16 board meetings throughout the year. These provided useful industry updates. There were also a number of meetings with external advisors and these provided useful financial reporting updates. I received daily financial news updates to allow me to keep up with business news and industry relevant material.

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

The most important thing which requires the most action is ensuring that I have sufficient knowledge to provide the skills that my clients need in the different ways Staying updated on business issues, tax changes and cybersecurity issues have been the most important for me this year.