CPD RECORD

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 A.N. Insolvency-Practitioner	**Membership ID M999999**
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.

Insolvency partner – to undertake formal insolvency appointments, provide advice to clients in respect of restructuring and insolvency matters in accordance with the firm's policies and procedures, current legislation and professional guidelines. To effectively manage staff and contribute to the profitability of the firm as a whole.

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 have 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.

Undertake training courses identified for my role and further technical and management training courses all as identified in planned (and completed) sections of my training record in addition to informal learning through keeping up to date with general issues affecting IP's.

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
Technical training ICAS Insolvency Practitioners Conference Moveable Transactions (Scotland) Act 2023 – implications for insolvency practitioners **Management Training** Leadership development course HR Managers workshop Social Media - LinkedIn training **General Awareness** Attend regional Insolvency Discussion Group Monthly ICAS Insolvency Technical Update Read ICAS Monitoring Reports CA Magazine Recovery magazine R3 Technical Bulletin Dear IP Accountant in Bankruptcy Stakeholder event

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?

Activity	Learning outcome	Application	Link to needs
20/2/25 – Anti-money Laundering update	Refresh knowledge of AML requirements	Renewed approach to AML checks as part of case take on procedures	Updated technical knowledge; management risk reduction
18/3/25 – A Solicitor webinar on Moveable Transactions (Scotland) Act 2023	Legislative update	Understood impact on work of IPs	Updated technical knowledge
26/6/25 – Read ICAS Insolvency Monitoring Report 2024	Understand common issues found in monitoring visits	Reviewed firm processes in key areas	Updated technical knowledge; management risk reduction
4/8/25 – Maximising value from LinkedIn	Greater understanding of social media as a tool	Regularly utilise LinkedIn to increase contacts and influence	Increased business winning opportunities
27/8/25 – Social styling workshop	Personal clothing style and colouring	New wardrobe of clothing	Soft skills development
19 & 20/9/25 – Leadership development workshop	WIP management; Increasing business winning opportunities; building a team.	Restructured WIP monitoring	More effective business management
9 & 10/9/25 – Insolvency Practitioners Conference	Technical update; Key issues facing profession; Data Protection Act issues	DPA risk management issues raised at partners meeting	Update technical knowledge; practice management development.
19/11/25 – Media training	How to handle TV, radio and press conference interviews	STV news interview on appointment to Big Co plc	Professional performance
3/12/25 – HR Managers workshop	Techniques to more effectively manage staff	Better planning of return to work interviews	More effective business management; building better teams

General reading record

CA Magazine - monthly

ICAS Insolvency technical update - monthly

Recovery magazine - quarterly

R3 Technical Bulletin – as published

Dear IP – as published

Accountancy Age website – daily review

ICAS website – weekly review

Various solicitors' technical updates on Insolvency related issues – as issued

Courses attended and reading undertaken have ensured that I am aware of current issues in the insolvency and restructuring marketplace to enable me to fulfil my responsibilities in respect of formal appointments and my contribution to the firm's overall objectives.

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

You are required to keep a copy of this record for three years.

Tools to increase effectiveness of practice management and increase business winning opportunities. This has resulted in reducing WIP lockup by 15%, reduced staff absence by 4% and increased number of new case appointments by 7%.

You are required to keep a copy of this record for three years.