



CPD RECORD: SHORT TERM CAREER BREAK 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: Mr D Davies	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 work as a tax manager in the tax department of a medium sized practice. The tax department staff and clients expect me to be able to answer technical questions and provide guidance and support to them. I also need to keep abreast of any accounting changes. As a CA, I'm expected to work ethically and with integrity.

I was full-time until September and have since been off work looking after my sick mother – I don't know when I will be able to return to work but, most likely, will return some time in the first half of next year.

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

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.

Various tax and accountancy courses to keep up to date on tax and accounting developments and sector knowledge. See step 3.

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 planned:

April 2025: VAT – Services Industry (Webinar)

May 2025: Trusts and Estates Annual Refresher (face to face course by external provider)

May 2025: Spring Tax Update (face to face course by external provider)

November 2025: UK GAAP course

December 2025: Corporation tax course

Various reading including CA magazine, Taxation, HMRC website, ICAS website and an online tax update service.

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?

First 9 Months: all courses above planned were attended. These courses ensured that I kept up to date with my technical knowledge in conducting my work as a tax manager. I was unable to attend the UK GAAP Course or the Corporate Tax course planned but address this in my plan below.

In September I had to go on long term leave from work to care for my sick mother. I have not been able to do much CPD since then, except for reading CA magazine and scanning the ICAS email updates. This has ensured I am generally keeping an eye on developments whilst I am off.

My plan for returning to work will include:

- ***Meetings within my department, including the partners, to get up to speed with developments***
- ***Attending a tax update and accounts update***
- ***Attending the corporation tax course I missed***
- ***Returning to detailed reading of CA magazine, Taxation, HMRC website, ICAS website and an online tax update service.***

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

My family commitments have been my priority and whilst I haven't had time recently for much CPD, just by keeping an eye on CA Magazine and the daily news updates has meant that I know what I need to do when I return to work.