

**PMI AAP CPD – Evidence Guidelines**

<b>Structured CPD (30 minute minimum study period)</b>			
<b>Activity</b>	<b>Definition</b>	<b>Acceptable evidence</b>	<b>Unacceptable evidence</b>
Examination setting and marking	Setting and marking any examination which relates directly to investment advice. (Maximum 10 hours per CPD year)	Official letter/email from the awarding organisation confirming your role and the number of claimable CPD hours.	Invitation to participate in the activity. Calendar/diary entries.
Publishing articles	Writing articles, manuals and reports relevant to investment advice e.g. PMI News either in print or online. (Maximum 10 hours per CPD year)	Official letter/email from the publisher confirming your authorship or copy of material with confirmation of your authorship.	Invitation to author material. Copy of material without confirmation of your authorship.
Leading courses, workshops, seminars, web forums, internal meetings and webinars as subject matter expert	Events which require active participation and have clear learning outcomes that are relevant to investment advice.	Official letter/email from the organiser confirming your involvement and duration of your involvement. Copy of your presentation with confirmation of your authorship.	Invitation to participate in the activity. Calendar/diary entries. Promotional material showing your planned involvement.
On-job Training	Participation in informal training sessions at place of work, relating to investment advice as a trainer.	Record of dates, duration, learning needs addressed, training provided and identity of trainee(s).	Letter/email from the trainee(s) confirming your activities as on-job trainer and the dates and duration of your involvement.
Attending courses, workshops, seminars, web forums and webinars	Events which require active participation and have clear learning outcomes that are relevant to investment advice.	Confirmation of your attendance (in the form of a Certificate of Attendance or letter/email from the organiser or your firm) confirming your name, event title, date, number of claimable CPD hours and (if applicable) the grade or score achieved in any formal assessment.	Confirmation of booking. Calendar/diary entries. Event invitation, programme, delegate pack or notes.
Business education	Attending education premises or using distance learning technology to complete programmes directly relevant to investment advice offered by an awarding organisation with formal external assessment and recognised qualification on successful completion.	Confirmation of your attendance (in the form of a letter/email from the awarding organisation or your firm) confirming your name, programme title, number of claimable CPD hours (for learning and the assessment) and the grade or score achieved in the qualification. A copy of any exam certificate.	Confirmation of booking. Qualification entry form. Calendar/diary entries. Programme schedule, learning materials or notes.
E-learning	Online courses which set clear objectives and learning outcomes that are relevant to investment advice and are subject to structured testing/assessment.	Record or Certificate of Completion or Achievement from the e-learning provider confirming your name, the activity title, date, duration and (if applicable) the grade or score achieved in any assessment.	Confirmation of booking. Calendar/diary entries. Data from a learning management system lacking activity duration or confirmation of completion/achievement.

<b>Unstructured CPD</b>			
<b>Activity</b>	<b>Definition</b>	<b>Acceptable evidence</b>	<b>Desirable evidence</b>
Reading published articles	Investment advice related articles published in technical, trade, journals, financial publications or online news services.	Details of article(s) read, time spent and learning outcomes	Indication of how learning outcomes relate to investment advice activities.
Mentoring	Providing coaching, instruction or guidance to trainees and students.	Record of dates, duration, issues addressed and identity of mentee.	Letter/email from the mentee confirming dates, time spent and the issues addressed during the mentoring period.
Informal study	Use of DVDs, TV programmes, general online content relevant to investment advice e.g. PMI TV.	Details of study/programmes undertaken, time spent and learning outcomes.	Indication of how material studied relates to investment advice activities.
On-job Training	Participation in informal training sessions at place of work, relating to investment advice as a trainee/learner.	Record of dates, duration, learning needs addressed, training provided and identity of trainer.	Letter/email from the trainer confirming your activities as on-job trainee and the dates and duration of your involvement.
Research	Conduct research on matters related to investment advice.	Details of research carried out, dates, duration and learning outcomes.	Indication of how learning outcomes relate to investment advice activities.