

PMI ACCREDITED ADVISER PROGRAMME (PMI AAP)

Summary of the Requirement of the PMI AAP

Event	Requirement
Joining the PMIAAP without a Statement of Professional Standing (SPS), eg a newly qualified adviser where CPD activity has not been undertaken/is not applicable.	<ol style="list-style-type: none"> 1. Completed application form 2. Appropriate qualification as defined in the FCA Handbook 3. FCA Approved Person status (CF30) – retail investment adviser 4. Compliance with the FCA's Approved persons Regime (APER) 5. Undertaking to comply with PMI AAP, Terms and Conditions and applicable membership regulations <p>NB An initial SPS is issued in this instance.</p>
Joining the PMI AAP with a current SPS from another Accredited Body	<ol style="list-style-type: none"> 1. Completed application form 2. Appropriate qualification as defined in the FCA Handbook 3. FCA Approved Person status (CF30) – retail investment adviser 4. Compliance with APER 5. Declaration of sufficient, appropriate and relevant CPD undertaken. An itemised summary of CPD activity. 6. A copy of the current SPS. 7. Undertaking to comply with PMI AAP, Terms and Conditions and applicable membership regulations
Renewing an SPS	<ol style="list-style-type: none"> 1. Completed application form 2. Declaration of CPD undertaken. An itemised summary of CPD activity. 3. Compliance with APER 4. Undertaking to comply with PMI AAP Terms and Conditions and applicable membership regulations
Selected for CPD Verification	<ol style="list-style-type: none"> 1. Evidence of CPD activity undertaken as specified by CPD Evidence Guidelines: 2. An itemised summary of CPD activity.

Relevant fees will also apply and details can be found on the website.

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