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| **Continuing Professional Development Scheme**  **2016/2017** | |
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| Version 1 | Effective from 1 July 2016 |

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| **Note: Text in red italics is defined in Schedule 4 and hyper-linked for ease of reference** | | |
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| **1.** | **Application** | |
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| **1.1** | All members of the Institute and Faculty of Actuaries (IFoA) have an obligation under the Actuaries’ Code to maintain their competence. This Continuing Professional Development Scheme (the Scheme) sets out the framework which assists members in complying with this obligation. Continuing professional development (CPD) is learning which is relevant to the nature of the member’s work or role and which addresses a personal development need. | |
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| **1.2** | All members must demonstrate that either:   * they have undertaken the appropriate minimum amount of continuing professional development ([*CPD*](#CPD)) in accordance with the requirements of this Scheme; or   due to their personal circumstances, they are exempt from the requirements of this Scheme. | |
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| **1.3** | This Scheme is effective from 1 July 2016 to 30 June 2017. | |
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| **2.** | **Categories** | |
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| **2.1** | Each member of the IFoA will fall intoat least one of the following categories: | |
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|  | **Category 1:** | All members who hold a [*practising* *certificat*e](#practising_certificate) issued by the IFoA |
|  | **Category 2:** | All [*fully regulated*](#fully_regulated)Fellows and Associates of the IFoA who do not hold a [*practising certificate*](#practising_certificate) \* |
|  | **Category 3:** | All [*partially regulated*](#partially_regulated) Fellows and Associates of the IFoA \* |
|  | **Category 4:** | All Certified Actuarial Analysts of the IFoA \* |
|  | **Category 5:** | All Student members of the IFoA who are not Student Actuarial Analysts\* |
|  | **Category 6:** | All Student Actuarial Analyst members of the IFoA \* |
|  | **Category 7:** | [*Retired*](#retired) members |
|  | **Category 8:** | Honorary Fellows and Affiliates |
|  | \* *and who have not been registered as retired members for the purposes of Category 7.* | |
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| **2.2** | The specific requirements of each category are set out in sections 3 to 10 of this Scheme. | |
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| **2.3** | Members must check that the CPD category recorded in their [*on-line CPD record*](#online_cpd_record) is correct. | |
| **3.** | **Category 1** | |
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| **3.1** | **Definition**  All members who hold a [*practising certificate*](#practising_certificate)issued by the IFoA are Category 1 members for the purposes of this Scheme. | |
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| **3.2** | **CPD year**  The Category 1 CPD year runs for one full year from the [*relevant date*](#relevant_date).  Category 1 members’ obligations under this Scheme shall have effect from the [*relevant date*](#relevant_date)*.* | |
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| **3.3** | **Requirements**  Category 1 members must complete at least 30 hours of [*CPD*](#CPD) in the course of each CPD year.  Of those 30 hours, a minimum of 20 hours must relate to [*technical skills*](#technical_skills).  Of those 20 hours relating to [*technica*l *skills*](#technical_skills), at least 10 hours must be obtained at [*external events*](#external_events).  Category 1 members must complete two hours of Professional Skills Training ([*PST*](#PST)), as set out in Schedule 3 to this Scheme. Time spent completing the relevant [*PST*](#PST) requirement may be counted towards the overall 30 hours requirement.  The balance of members’ minimum requirement may be gained through such other activities as each member deems appropriate taking into account the nature of their work or role and their personal development needs.  Category 1 members are not permitted to count time engaged in private study towards their minimum [*CPD*](#CPD) requirement.  Category 1 members must record a [*learning outcome*](#learning_outcome) for each [*CPD*](#CPD) activity listed in their [*on-line CPD record*](#online_cpd_record). | |
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| **3.4** | **Recording CPD**  Category 1 members must record their [*CPD*](#CPD) in their [*on-line CPD record*](#online_cpd_record) by the end of their CPD year. | |
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| **3.4.1** | **Failure to record**  Category 1 members who fail to comply with the requirements of this Scheme will not be entitled to renew their [*practising certificate*](#practising_certificate) until such time as their compliance has been addressed to the reasonable satisfaction of the IFoA. | |
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| **3.5** | **Evidence of CPD**  Category 1 members must retain [*evidence*](#evidence) of their participation in the activities listed in their [*on-line CPD record*](#online_cpd_record)for a period of two years from the date of the activity and must produce that [*evidence*](#evidence) to the IFoA upon request. | |

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| **4.** | **Category 2** |
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| **4.1** | **Definition**  All [*fully regulated*](#fully_regulated) Fellows and Associates of the IFoA who do not hold a [*practising certificate*](#practising_certificate)on 1 July 2016 and who have not been classified as retired by the IFoA are Category 2 members for the purposes of this Scheme. |
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| **4.2** | **CPD year**  The Category 2 CPD year runs from 1 July 2016 to 30 June 2017.  Category 2 members’ obligations under the Scheme shall have effect from 1 July following their transfer to Fellow or Associate. |
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| **4.3** | **Requirements**  Category 2 members must complete at least 15 hours of [*CPD*](#CPD) in the course of the CPD year.  Of those 15 hours a minimum of 5 hours must be obtained at [*external events*](#external_events).  The balance of Category 2 members’ minimum requirement may be gained through such other activities as the individual member deems appropriate taking into account their work or role and their personal development needs.  Category 2 members must also complete one of the following Professional Skills Training ([*PST*](#PST)) stages in each CPD year:   * **Stage 3 - Professional Skills for Experienced Members** (see Schedule 3)   Most fully regulated Fellows and Associates will have completed Stage 2 of the PST before reaching Category 2 and will therefore be required to undertake Stage 3 each year.   * **Stage 2 - the Professional Skills Course** (See Schedule 2)   Category 2 members who have not yet completed Stage 2 of the PST must do so within one year of transferring to the category of Fellow. Members will progress to Stage 3 of the [*PST*](#PST) in the following CPD year.  Time spent completing the relevant [*PST*](#PST) requirement can be counted towards the overall 15 hours requirement. |
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| **4.4** | **Recording CPD**  Category 2 members must record their [*CPD*](#CPD) activities, and any [*learning outcomes*](#learning_outcome)corresponding to private study activities,for the CPD year in their [*on-line CPD record*](#online_cpd_record)by 31 July 2017.  Category 2 members who fail to record their [*CPD*](#CPD) by the deadline will be granted an extension to 30 September 2017, upon making payment of an [*administration fee*](#administration_fee)*.* |
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| **4.5** | **Evidence of CPD**  Category 2 members must retain [*evidence*](#evidence) of their participation in the activities listed in their [*on-line CPD record*](#online_cpd_record) for a period of two years from the date of the event and must produce that [*evidence*](#evidence) to the IFoA upon request.  For the purposes of the Scheme, a relevant [*learning outcome*](#learning_outcome) shall constitute [*evidence*](#evidence) of private study. |
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| **4.6** | **Category 2 members working overseas**  Category 2 members may elect to satisfy the requirements of this Scheme by complying with one of the recognised International Actuarial Association (IAA) bodies’ CPD Schemes (listed in Schedule 5 to the Scheme).  Members who choose to comply with another IAA body’s CPD requirements must complete the relevant Category 2 [*PST*](#PST) component in each CPD year, as set out at section 4.3 of the Scheme.  Category 2 members who wish to comply with an IAA CPD Scheme must confirm their decision to the Membership team in writing at [cpd\_feedback@actuaries.org.uk](mailto:cpd_feedback@actuaries.org.uk?subject=Cat%202%20-%20Decision%20to%20comply%20with%20IAA%20body%20CPD%20scheme) by 31 July 2017.  Category 2 members who fail to inform the Membership team of their decision to comply with an IAA body’s Scheme by the 31 July 2017 deadline will be granted an extension to 30 September 2017, upon making payment of an [*administration fee*](#administration_fee)*.*  Category 2 members who elect to comply with one of the IAA bodies’ schemes must retain [*evidence*](#evidence) of their compliance:   * with the chosen IAA scheme; and * with the relevant [*PST*](#PST) requirement,   for a period of at least two years from the date of each event and must produce that [*evidence*](#evidence) to the IFoA upon request. |

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| **5.** | **Category 3** |
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| **5.1** | **Definition**  All members who are [*partially regulated*](#partially_regulated)Fellows and Associates of the IFoA on 1 July 2016 and who have not been classified as retired by the IFoA are Category 3 members for the purposes of this Scheme. |
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| **5.2** | **CPD year**  The Category 3 CPD year runs from 1 July 2016 to 30 June 2017.  Category 3 members’ obligations under the Scheme shall have effect from 1 July following their transfer to Fellow or Associate. |
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| **5.3** | **Requirements**  Category 3 members must comply with the CPD requirements of their primary regulator.  Category 3 members must also complete one of the following Professional Skills Training ([*PST*](#PST)) stages in each CPD year:   * **Stage 3 – Professional Skills for Experienced Members** (see Schedule 3)   To be undertaken each year by all Category 3 members who have completed Stage 2 of the[*PST*](#PST) or a professionalism event under the IFoA’s historic regime.   * **Stage 2 – Professional Skills Course** (see Schedule 2)   To be completed by Category 3 members within one year of transfer to the category of Fellow.  On completion of Stage 2 of the [*PST*](#PST), members will progress to Stage 3. |
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| **5.4**  **5.5** | **Evidence of CPD**  Category 3 members must retain [*evidence*](#evidence) of their participation in their [*CPD*](#CPD) activities, which includes PST activities, for a period of two years from the date of the activity and must produce that [*evidence*](#evidence) to the IFoA upon request.  **Obligation to confirm a change in circumstance**  Category 3 members must inform the Membership Team at [cpd\_feedback@actuaries.org.uk](mailto:cpd_feedback@actuaries.org.uk) as soon as practicable if they are no longer eligible to be partially regulated. |
| **6.** | **Category 4 requirements** |
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| **6.1** | **Definition**  All members who are Certified Actuarial Analysts of the IFoA on 1 July 2016 and who have not been classified as retired by the IFoA are Category 4 members for the purposes of this Scheme. |
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| **6.2** | **CPD year**  The Category 4 CPD year will run from 1 July 2016 to 30 June 2017.  Category 4 members’ obligations under the Scheme shall have effect from 1 July following their qualification as a Certified Actuarial Analyst. |
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| **6.3** | **Requirements**  Category 4 members must complete at least 15 hours of[*CPD*](#CPD)in the course of the CPD year.  Of those 15 hours:   * a minimum of 5 hours must be obtained at [*external events*](#external_events); and   a minimum of 2 hours must contribute to the member’s understanding of ethical behaviours in relation to their role. |
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| **6.4** | **Recording CPD**  Category 4 members must record their [*CPD*](#CPD) activities, and any [*learning outcomes*](#learning_outcome)corresponding to private study activities, for the CPD year in their [*on-line CPD record*](#online_cpd_record) by 31 July 2017.  Category 4 members who fail to record their [*CPD*](#CPD) by the deadline will be granted an extension to 30 September 2017, upon making payment of an [*administration fee*](#administration_fee) |
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| **6.5** | **Evidence of CPD**  Category 4 members must retain [*evidence*](#evidence) of their participation in the activities listed in their  [*on-line CPD record*](#online_cpd_record) for a period of two years from the date of the event and must produce that [*evidence*](#evidence) to the IFoA upon request.  For the purposes of the Scheme, a relevant [*learning outcome*](#learning_outcome)shall constitute [*evidence*](#evidence) of private study. |

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| **7.** | **Category 5 requirements** |
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| **7.1** | **Definition**  All Students, who are not Student Actuarial Analysts, of the IFoA on 1 July 2016 and who have not been classified as retired by the IFoA are Category 5 members for the purposes of this Scheme. |
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| **7.2** | **CPD year**  The Category 5 CPD year runs from 1 July 2016 to 30 June 2017.  Category 5 members’ obligations under the Scheme shall have effect from 1 July following admission to the IFoA. |
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| **7.3** | **Requirements**  There is no[*technical skills*](#technical_skills) requirement for Category 5 members.  Category 5 members are required to undertake the following [*PST*](#PST) stages at the time specified below:   * **Stage 1 – On-line Professional Awareness Test** (see Schedule 1)   To be completed by all Category 5 members who joined the IFoA on or after 1 March 2012, before being eligible to sit the IFoA’s Business Awareness Exam (CT9).  Category 5 members who joined the IFoA before 1 March 2012 are not required to complete Stage 1 of the [*PST*](#PST).  On completion of Stage 1, members will progress to Stage 2.   * **Stage 2 – Professional Skills Course** (see Schedule 2)   To be completed by Category 5 members who joined the IFoA on or after 1 July 2006:   * + between the fourth and sixth anniversaries of their admission to the IFoA; or   + before transferring to Associate status,   whichever comes first.  Members will progress to Stage 3 of the [*PST*](#PST) in the following CPD year.   * **Stage 3 – Professional Skills for Experienced Actuaries** (see Schedule 3)   To be completed annually by all Category 5 members who have   * completed Stage 2 of the PST\*; or * joined the IFoA prior to 1 July 2006\*   \* *and are not retired members for the purposes of Category 7* |
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| **7.4** | **Recording CPD**  Category 5 members must record their stage 3 PST activities, and any [*learning outcomes*](#learning_outcome)corresponding to private study activities, for the CPD year in their [*on-line CPD record*](#online_cpd_record)by 31 July 2016.  Category 5 members who fail to record their [*CPD*](#CPD) by the deadline will be granted an extension to 30 September 2017, upon making payment of an [*administration fee*](#administration_fee)*.* |
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| **7.5** | **Evidence of CPD**  Category 5 members must retain [*evidence*](#evidence) of their Stage 3 [*CPD*](#CPD) activities for a period of two years from the date of the activity and must produce that [*evidence*](#evidence) to the IFoA upon request. |

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| **8.** | **Category 6 requirements** |
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| **8.1** | **Definition**  All members who are Student Actuarial Analysts of the IFoA on 1 July 2016 and who have not been classified as retired by the IFoA are Category 6 members for the purposes of this Scheme. |
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| **8.2** | **CPD year**  The Category 6 CPD year runs from 1 July 2016 to 30 June 2017.  Category 6 members’ obligations under the Scheme shall have effect from 1 July following their admission as Student Actuarial Analyst. |
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| **8.3** | **Requirements**  There is no [*technical skills*](#technical_skills) requirement for Category 6 members.  Category 6 members must undertake Stage 1 of the [*PST*](#PST) (see Schedule 1) by the end of their first CPD year. |
| **9.** | **Category 7 requirements** |
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| **9.1** | **Definition**  Members who:   * are not in paid work which relies upon their actuarial training and experience, in the widest interpretation, or on their membership of the IFoA; and * do not expect to return to such work in the foreseeable future,   may apply to the IFoA to be registered as [*retired*](#retired) and classified as a Category 7 member.  By doing so, [*retired*](#retired) members will no longer be required to confirm their status to the IFoA each CPD year. |
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| **9.2** | **Requirements**  Category 7 members do not have to complete any [*CPD*](#CPD), unless they are doing relevant unpaid work (see paragraph 9.5 below). |
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| **9.3** | **Obligation to confirm a change in status** |
|  | Category 7 members must inform the Membership Team at [cpd\_feedback@actuaries.org.uk](mailto:cpd_feedback@actuaries.org.uk?subject=Cat%207%20-%20Report%20of%20change%20in%20cirucmstances) as soon as reasonably practicable if they return to work. |
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| **9.4** | **How to apply** |
|  | Retired members who wish to apply to the IFoA to join Category 7 must write to the Membership Team at [cpd\_feedback@actuaries.org.uk](mailto:cpd_feedback@actuaries.org.uk?subject=Request%20for%20Retired%20classification) confirming their retired status. |
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| **9.5** | **Unpaid work**  Category 7 members who undertake unpaid work which relies upon their actuarial training and experience, in the widest interpretation, must complete such [*CPD*](#CPD) as they reasonably consider to be appropriate in the circumstances.  Category 7 members who complete [*CPD*](#CPD) must retain evidence of their participation in those activities for a period of two years from the date of the activity and must produce that evidence to the IFoA upon request. |
| **10.** | **Category 8 requirements** |
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| **10.1** | **Definition**  All Honorary Fellows and Affiliates of the IFoA are Category 8 members. |
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| **10.2** | **Requirements**  Category 8 members do not have to complete any [*CPD*](#CPD) under this Scheme. |
| **11.** | **Exemptions** |
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| **11.1** | **Category 1 members** |
| **11.1.1** | **Partial exemption**  Members in Category 1 who are absent from work for more than three consecutive months may apply for a partial exemption from the requirements of the CPD Scheme.  Members in Category 1 who are granted a partial exemption must complete 2.5 hours of [*CPD*](#CPD) activities for each whole month worked over the course of two consecutive CPD years which include the period of absence, subject to a minimum of 10 hours over the course of the two consecutive CPD years.  The required amount of [*CPD*](#CPD) must be completed by the end of the two year period and must satisfy the following conditions:   * at least two thirds of the total activities must relate to technical skills, half of which must be gained at external events; and * at least four hours must be Stage 3 PST.   The balance of the required [*CPD*](#CPD) hours, if any, may be gained through such other activities as each member deems appropriate, taking into account the nature of their work or role and their personal development needs.  Category 1 members are not permitted to count time engaged in private study towards their required [*CPD*](#CPD) hours.  Category 1 members must record a learning outcome for each [*CPD*](#CPD) activity listed in their on-line CPD record. |
| **11.2** | **Category 2 and 4 members** |
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| **11.2.1** | **Full exemption**  Members in Categories 2 and 4 may be entitled to an exemption from the full requirements of the CPD Scheme if the IFoA, in its sole discretion, is satisfied that the public interest is not served by requiring that member to complete a programme of [*CPD*](#CPD).  Although each case will be considered on its merits, exemptions may be granted where the member can show that:   1. their actuarial training and experience, in the widest interpretation, and their membership of the IFoA, makes no contribution to their paid work; or 2. they have not been in paid work related to their actuarial training and experience over the course of the CPD year for a total of more than 20 hours; or 3. there are exceptional circumstances such as serious ill health, which prevent the member from complying with the requirements of this Scheme. |
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| **11.2.2** | **Partial exemption**  Members in Categories 2 and 4 who are absent from work for more than three consecutive months may apply for a partial exemption from the requirements of the CPD Scheme in respect of the relevant CPD years.  Where the period of leave spans more than one CPD year, the partial exemption will apply to each CPD year in which the member is absent from work for at least one month.  Members in Category 2 who apply for and are granted a partial exemption must complete:   * the relevant stage of Professional Skills Training; * one additional hour of learning gained at an external event; and * one additional hour of [*CPD*](#CPD) for each whole calendar month worked in the CPD year.   Members in Category 4 who apply for and are granted a partial exemption must complete:   * two hours of learning which contributes to the member’s understanding of ethical behaviours in relation to their role; * one additional hour of learning gained at an external event; and * one additional hour of [*CPD*](#CPD) for each whole calendar month worked in the CPD year. |
|  | The balance of the required [*CPD*](#CPD) hours, if any, may be gained through such other activities as each member deems appropriate, taking into account the nature of their work or role and their personal development needs. |
| **11.3** | **Category 3 members** |
|  | Category 3 members who are absent from work for more than six consecutive months in any one CPD year may apply for a partial exemption from the requirements of this Scheme.  Category 3 members who are granted a partial exemption will have no [*PST*](#PST) requirement in respect of that CPD year. They will, however, be required to complete such other CPD as required by their primary regulator. |
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| **11.4** | **Category 5 and 6 members**  Members in Categories 5 and 6 who are absent from work for more than six consecutive months in any one CPD year may apply for an exemption from the requirements of the CPD Scheme in respect of that CPD year. |
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| **11.5** | **Applying for an exemption**  To apply for an exemption, members must submit a written request to the Membership team at [cpd\_feedback@actuaries.org.uk](mailto:cpd_feedback@actuaries.org.uk?subject=Application%20for%20an%20exemption) by 31 July 2017. |
| **12.** | **Enforcement**  Members may be referred under the Disciplinary Scheme in relation to any default under the Scheme.  In certain circumstances, members may be offered the alternative of making payment of a [*charge*](#charge) and having the fact of their default recorded in both the IFoA’s Register of Non-compliers and the Actuarial Directory.  This option is only likely to be open to members who have not defaulted on the terms of the Scheme in the preceding ten year period. |

**Schedule 1**

**Stage 1 Professional Skills Training – On-line Professional Awareness Test**

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| **1.** | **Application**  All Category 5 members who joined the IFoA on or after 1 March 2012 must pass Stage 1 before being eligible to sit the IFoA’s Business Awareness Exam (CT9).  All Category 6 members must pass Stage 1 by the end of their first CPD year. |
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| **2.** | **Registration**  Members may register to sit Stage 1 using the application form available on the [IFoA’s website](http://www.actuaries.org.uk/research-and-resources/documents/professionalism-awareness-committee-2012-application-form-online-pr). |
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| **3.** | **Fee**  No fee is charged for Stage 1. |
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| **4.** | **Completion**  On successful completion of Stage 1, Category 5 members will progress to Stage 2 of the PST. |

**Schedule 2**

**Stage 2 Professional Skills Training - Professional Skills Course**

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| **1.** | **Application** |
| **1.1** | **Category 2 and 3 members**  Category 2 and 3 members admitted to the IFoA on or after 1 July 2006 who have not already completed Stage 2 or a professionalism course under the previous regime must sit Stage 2 within one year of transfer to the category of Fellow. |
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| **1.2** | **Category 5 members**  Category 5 members admitted to the IFoA before 1 July 2006 must undertake Stage 2 before transferring to Associate status.  Category 5 members admitted to the IFoA on or after 1 July 2006 must undertake Stage 2:   * between the fourth and sixth anniversaries of their admission to the IFoA; or * before transferring to Associate status. |
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| **2.** | **Format** |
| **2.1** | **Face-to-face event**  This is a one day event which features a variety of topics of professionalism and includes interactive, generic and practice specific case studies. |
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| **2.2** | **Interactive on-line course**  Members who select this option must complete a number of web-based modules over a period of three weeks. |
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| **2.2.1** | The requirement to complete Stage 2 will be deemed to have been fulfilled when the on-line facilitator confirms that the participant has sufficiently engaged with the course content and contributed appropriate on-line postings. Guidelines will be issued to participants prior to their commencing the on-line course so that they are fully aware of the expectations of the facilitators with regard to the expected level of participation. |
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| **3.** | **Registration**  Members may apply to attend a face-to-face event or to undertake an on-line course using the forms published within the PST section of the [IFoA’s website](http://www.actuaries.org.uk/regulation/pages/professional-skills-course-psc). |
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| **4.** | **Fee**  The IFoA do not charge a fee for either the face-to-face or on-line courses. |
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| **5.** | **Completion**  On completion of Stage 2, members will progress to Stage 3 of the [*PST*](#PST) in the following CPD year. |

**Schedule 3**

**Stage 3 Professional Skills Training – Professional Skills for Experienced Members**

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| **1.** | **Application**  Stage 3 must be completed by members in the following categories: | |
|  | **Category 1:** | All members who hold a [*practising* *certificat*e](#practising_certificate) issued by the IFoA; |
|  | **Category 2:** | [*Fully regulated*](#fully_regulated)Fellows and Associates of the IFoA who do not hold a [*practising certificate*](#practising_certificate)*\*;* |
|  | **Category 3:** | [*Partially regulated*](#partially_regulated) Fellows and Associates of the IFoA\*; and |
|  | **Category 5:** | Student members of the IFoA who:   * completed Stage 2 of the PST\*; or * joined the IFoA prior to 1 July 2006\*   \* *and are not retired members for the purposes of Category 7* |
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| **2.** | **Format**  Stage 3 is an annual requirement to complete two hours of Professional Skills Training which may be acquired by attending events, by completing an on-line activity or by a combination of both types of activity.  While the IFoA offers events and on-line programmes at no cost, members are free to source events and on-line courses from other providers, subject to the requirement that they satisfy one or more of the objectives specified at section 3, below. | |
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| **3.** | **Objectives**  In order to qualify as Stage 3 training the activity should enhance the member’s understanding of an actuary’s professional obligations and achieve one or more of the following objectives:   * enhance understanding of principles of ethical behaviour and how to apply these in making professional judgements; * enhance understanding of what it means to act in the public interest; * equip actuaries to make reasoned and justifiable decisions in resolving ethical dilemmas; * assist actuaries to demonstrate ethical behaviour in conducting their professional life; and * enable actuaries to recognise ethical dilemmas and take appropriate action. | |
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| **3.1** | Where the course is not provided by the IFoA, the following conditions must be satisfied:   * must be sourced from a suitable provider, of appropriate repute, such as a training company, a professional body, an employer of actuaries, a regulator, or another IAA member body; * must allow actuaries to demonstrate a relevant [*learning outcome*](#learning_outcome); and * must be capable of being evidenced to the IFoA in writing. | |

**Schedule 4**

**Definitions**

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| Administration fee | A payment of £50 to the IFoA. |
| Charge | A payment of £750 to the IFoA. |
| CPD | Learning which is relevant to the nature of the member’s work or role and which addresses a personal development need. |
| Evidence | Written evidence of participation in the CPD activity recorded which includes but is not limited to:   * a signed register of attendance; * a certificate vouching for the completion of a course or activity; * hard copies of lectures or presentations delivered by the member; * articles or papers written for publication; and * written confirmation from a provider of an on-line resource. |
| External events | Any training or development activity which exposes a member to an exchange of viewpoints and includes individuals from outside the member’s own organisation.  External events may include, but are not limited to:-   * relevant activities held within the member’s organisation which are hosted by, or which feature or include, a person from outside that organisation; and * digital or on-line seminars or other web-based learning activities. |
| Fully regulated | Fellows or Associates who are subject to the full regulation of the IFoA (i.e. who have not been granted partial regulation status). |
| Learning outcome | A description of the knowledge and/or skills which the member gained as a result of taking part in the CPD activity. |
| On-line CPD record | Members’ personal CPD records accessible via the members’ section of the [IFoA website](https://www.actuaries.org.uk/user). |
| Partially regulated | Members who have been granted partial regulation status by the IFoA. |
| Practising certificate | A practising certificate issued by the IFoA. |
| Professional Skills Training | The training regime operated by the IFoA which focuses on helping members take appropriate steps to make well reasoned decisions in situations where complex ethical judgements are required. |
| Relevant date | Either, the date:   * of the member’s application for a practising certificate, whether an initial or renewal application; or * selected by the member in accordance with the provisions of the Practising Certificate Scheme. |
| Retired | Members who:   * are not in paid work which relies upon their actuarial training and experience, in the widest interpretation, or on their membership of the IFoA; * do not expect to return to such work; and * have been registered by the IFoA as retired. |
| Technical skills | Skills which are technical in nature and specific to a member’s area or role. |

**Schedule 5**

**CPD Schemes recognised by the IFoA**

* **Institute of Actuaries of Australia (Australia)**
* **Canadian Institute of Actuaries (Canada)**
* **Institut des Actuaires (France)**
* **Deutsche Aktuarvereinigung e.V. (Germany)**
* **Actuarial Society of Hong Kong (Hong Kong)**
* **Society of Actuaries in Ireland (Ireland)**
* **Actuarial Society of Malaysia (Malaysia)**
* **Het Actuarieel Genootschap (Netherlands)**
* **New Zealand Society of Actuaries (New Zealand)**
* **Singapore Actuarial Society (Singapore)**
* **Actuarial Society of South Africa (South Africa)**
* **Association Suisse des Actuaires (Switzerland)**
* **American Academy of Actuaries (United States)**
* **Casualty Actuarial Society (United States)**
* **Society of Actuaries (United States)**