

Your CPD obligations and how to comply

Louis van Vuren, FISA CEO, explains CPD and how to capture your points.

Every FISA member is obliged to spend 60 hours in Continuous Professional Development (CPD) in a moving two year cycle.

CPD hours must be captured as points at a rate of one point per hour of CPD. Points can be collected by attending conferences and seminars, further formal studies, reading, authoring, lecturing and tutoring, etc. For more information visit: <https://www.fisa.net.za/wp-content/uploads/2016/02/FISA-CPD-Information-Version-2013-03-19.pdf>.

A moving two year cycle is e.g. from 1 January 2013 to 31 December 2014, or 1 January 2014 to 31 December 2015, is measured looking back two years, and will always start on 1 January.

Forty out of the sixty points in the moving two year cycle must be in the member's areas of expertise, e.g. estate planning, wills consultation and drafting, deceased estate administration, trust administration, or beneficiary funds.

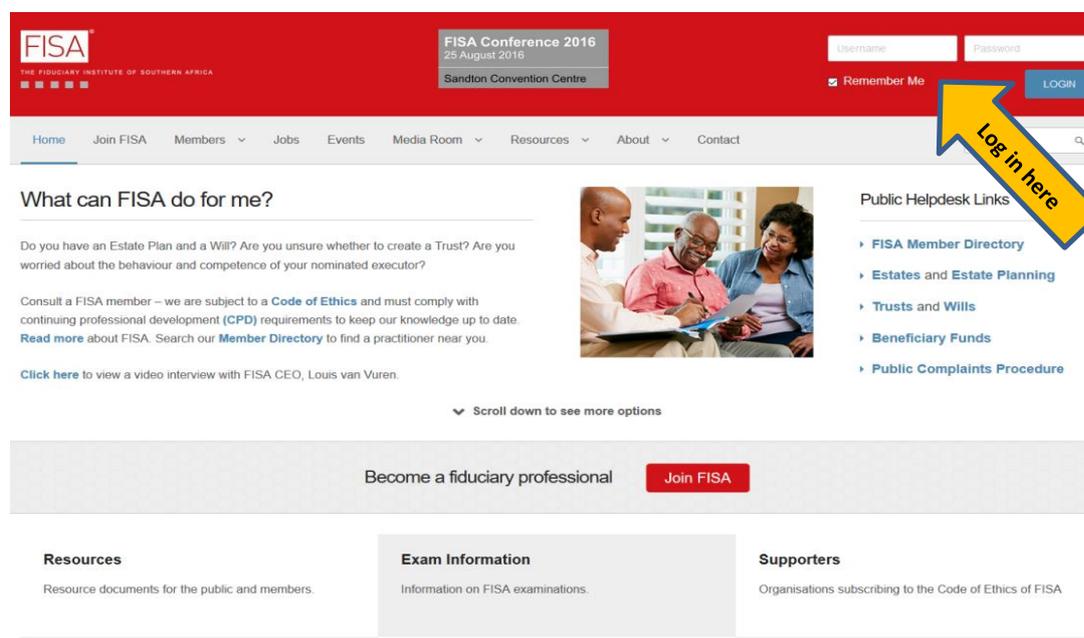
Forty out of the sixty points in a cycle must be verifiable meaning that an independent source of verification exists, e.g. attending a seminar where an attendance register was kept and is available for an audit by FISA.

FISA made keeping record of CPD points extremely easy by introducing a CPD log on the FISA website.

How to use the CPD log on the FISA website

STEP 1

Log into your profile on the FISA website. The login can be found in the top right hand corner of the FISA website. If you have lost or forgotten your logon credentials, there is a process available to rectify that.



The screenshot shows the FISA website interface. At the top, there is a red header with the FISA logo on the left, a navigation menu in the center, and a login form on the right. The login form includes fields for 'Username' and 'Password', a 'Remember Me' checkbox, and a 'LOGIN' button. A yellow arrow with the text 'Log in here' points to the 'LOGIN' button. Below the header, there is a navigation menu with links for Home, Join FISA, Members, Jobs, Events, Media Room, Resources, About, and Contact. The main content area features a section titled 'What can FISA do for me?' with a sub-section 'Public Helpdesk Links' containing links for FISA Member Directory, Estates and Estate Planning, Trusts and Wills, Beneficiary Funds, and Public Complaints Procedure. At the bottom, there is a section for 'Become a fiduciary professional' with a 'Join FISA' button, and three columns for 'Resources', 'Exam Information', and 'Supporters'.

STEP 2

Click on the **CPD points** tab and then on **ADD POINTS**:

The screenshot shows the FISA website interface. At the top, there is a red header with the FISA logo, the text 'THE FIDUCIARY INSTITUTE OF SOUTHERN AFRICA', and a navigation menu. The user is logged in as 'Louis' and is viewing their 'My Account' page. The 'CPD Points' tab is highlighted in blue. A yellow arrow points to the 'ADD POINTS' button, and another yellow arrow points to the 'CPD Points' tab. The page shows a summary of CPD points and a table with columns for Activity, Description, Date, Points, Edit, and Delete.

STEP 3

Pick the relevant activity category, enter the date of the activity, and enter a description.

Activity Categories - choose your activity from the list below *

- Authoring
- Convention or conference attended
- Seminar or workshop attended
- Assessment after seminar or workshop
- Examination
- Tertiary qualification
- Online training programme
- Membership of and participation in technical or special purpose committee
- Presentation, training, teaching or lecturing
- Uncategorized or other (e.g. reading)

Date that the activity was carried out *

10-09-2015

Describe the activity that was carried out *

Attending the 5th Annual FISA Conference

40 of 100 max characters

Calculate your points *

Indicate your area of expertise by choosing Yes or No under Verifiable. More than one area of expertise can be chosen.

Area(s) Of Expertise	Is This Activity Verifiable - Yes Or No?	Add Your Points
Law and Ethics in Fiduciary Services	-- v	0
Wills Consultation and Drafting	-- v	0
Deceased Estate Administration	-- v	0

STEP 4

For each area of expertise covered by the activity choose whether the activity is verifiable or not, and enter the number of points per area of expertise covered by the activity. E.g. if the

2015 FISA conference was attended, FISA supplied a breakdown which was displayed on the conference invitation:



Pick the applicable points and enter it on the log. FISA also accredits events offered by other bodies, e.g. the FPI.

40 of 100 max characters

Calculate your points *

Indicate your area of expertise by choosing Yes or No under Verifiable. More than one area of expertise can be chosen.

Area(s) Of Expertise	Is This Activity Verifiable - Yes Or No?	Add Your Points
Law and Ethics in Fiduciary Services	Yes	1
Wills Consultation and Drafting	Yes	2
Deceased Estate Administration	Yes	2
Estate Planning	--	0
Trust Administration	Yes	2
Beneficiary Fund Administration	--	0
Liquidations, Sequestrations and Curatorships	--	0
Other / Uncategorised	--	0

Total Points: 7

SUBMIT



STEP 5

Check whether the details were captured correctly and edit if necessary.

Presentation, training, teaching or lecturing	Lecturing estate planning to Milpark students.	2015-10-24	2	EDIT	DELETE
Seminar or workshop attended	Attending FISA Gauteng regional meeting	2015-11-12	2.5	EDIT	DELETE
Seminar or workshop attended	Attend FPI Annual Financial Planning Refresher	2015-11-19	5.5	EDIT	DELETE
Convention or conference	Attending the 5th Annual FISA Conference	2015-09-10	7	EDIT	DELETE

Period	Total Points
2013-2015	99.5



Happy capturing!