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.

My role is very technical, therefore I need to make sure I stay up to date with developments in all areas of taxation.

In addition, I am responsible for ensuring the tax team are appropriately trained and motivated.

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:
12 April 2013: Topical Tax Planning Tips for Accountants in Practice (face to face course by external provider)
15 May 2013: Trusts and Estates Annual Refresher (face to face course by external provider)
16 May 2013: Spring Tax Update (face to face course by external provider)

Online:
30 April 2013: VAT – Property & Construction (Webinar)

Other CPD activity involves reading CA magazine, Taxation, HMRC website, ICAS website and other technical and business material to ensure knowledge stays up to date. We also subscribe to an online tax update service and I review all updates as they are received and circulate to staff.
I attend monthly in-house accounting updates.
I am also on the ICAS Small Business Taxes sub-Committee, which meets three times a year in April, August and December. The benefits of this involvement include technical networking opportunities, keeping abreast of forthcoming changes and meetings with HMRC on behalf of ICAS.

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

<table>
<thead>
<tr>
<th>Courses:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>12 April 2013: Topical Tax Planning Tips for Accountants in Practice (face to face course by external provider)</strong></td>
<td>A useful update with several areas to consider that could be relevant to our client base.</td>
</tr>
<tr>
<td><strong>15 May 2013: Trusts and Estates Annual Refresher (face to face course by external provider)</strong></td>
<td>Provided a useful update particularly in relation to IHT developments.</td>
</tr>
<tr>
<td><strong>16 May 2013: Spring Tax Update (face to face course by external provider)</strong></td>
<td>Provided a useful update.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Online:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>30 April 2013: VAT – Property &amp; Construction (Webinar)</strong></td>
<td>This is an area that I have had relatively little experience of for several years and the webinar provided a useful refresher.</td>
</tr>
</tbody>
</table>

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

**Ensuring my technical knowledge is up to date to allow me to provide clients with appropriate advice.**

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