

Professional Paraplanner

Professional Paraplanner CPD Questions February 2022 issue

Professional Paraplanner is approved under the Chartered Institute for Securities & Investment's CPD accreditation scheme for financial planning

to enable paraplanners to accrue CPD points for reading the publication

The amount of credits will be determined by the length of time taken to read the articles within the magazine. Readers requiring Structured CPD points must read the magazine for at least 30 minutes and correctly answer the 10 questions on this page.

Under the CISI CPD Scheme all members must undertake a range of CPD activities in a year to demonstrate that they meet the requirements of the scheme. CPD activities undertaken during the year will fall under the following categories:

• Technical Knowledge • Ethics • Professional Standards • Personal Development • Practice Management

Members must satisfy themselves that the content is appropriate for their own development when allocating CPD points to their own record. The content will be reviewed on a quarterly basis by the CISI.

Complete and retain a copy of this page with your answers for CPD compliance purposes.

1. R0 Focus (p6)

The CII R06 is based on:

- Multiple choice questions
- Multiple choice questions and a case study
- Two case studies

2. R0 Focus (p6)

As well as a base knowledge what else does the writer suggest candidates ensure they are aware of?

3. Development (p10)

Name one productivity technique suggested in the article.

4. Exam study (p12)

Name the three criteria normally used as reference by the triple lock

1.

2.

3.

5. Exam study (p12)

What will be the percentage State Pension increase in April 2022?

2.5%

3.1%

3.9%

5. Development (p14)

What model devised by David Rock, is suggested paraplanners could use in respect of building trust with clients?

6. M&A (p16)

What percentage of adviser firms are said to be considering their succession planning today?

25%

50%

75%

7. Development (p18)

How does the writer suggest paraplanners deal with imposter syndrome?

8. Parameters (p19)

What percentage of paraplanner survey respondents said they believe current exams are still fit for purpose?

11%

31%

44%

45%

9. Markets (p22)

What is the predicted loss of GDP to the world economy due to Covid (at the time the article was written)?

3%

4%

5%

10. Sector Report (p24)

In 2021 the FTSE All Share underperformed global equities by what percentage?

3%

5%

7%

9%