

Professional Paraplanner

Professional Paraplanner CPD Questions – September 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. Complete and retain for CPD compliance purposes.

The number 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.

1. Paraplanning (p8)

Name one of the five attributes of a good paraplanner

2. Exams (p6)

Name one way neurodivergent learners may receive exam support

3. Development (p10)

Name one way the writers suggest paraplanners can boost their confidence

4. IHT and gifting (12)

Gifts to political parties are not exempt from IHT liabilities

True

False

5. IHT and gifting (12)

There is no monetary limit to gifts of money made from surplus income under 'normal expenditure out of income exemption' rules

True

False

6. Legal (p14)

Name one beneficial owner of a trust for Trust Registration Service purposes.

7. Tax (p16)

How much did VCTs raise in 2021/22 tax year?

£0.9bn

£1.1bn

£1.3bn

£1.5bn

8. Exams (p19)

Name one potential disadvantage of ESG/SRI investments.

9. Sector report (p24)

Historically, what premium have Indian equities traded at compared to other emerging markets?

20%

30%

40%

70%

10. Sector report (p24)

What percentage of the population of India is under age 25?

25%+

45%+

47%+

50%+