

Financial counsellors' Continuing Professional Development

Continuing Professional Development (CPD) is the reinforcement or acquisition of skills or knowledge relevant to the financial counselling role.

APPLICATION

CPD requirements apply to Associate members and Accredited members.

AMOUNT

A financial counsellor must complete **20 points of CPD per membership year.**

THREE CATEGORIES

There are three categories of CPD. Each training session will be classified into one or more of those categories.

Technical – e.g. content knowledge relevant to legal issues, banking, fines, EDR/IDR, superannuation, hardship, insurance, completion of Statements of Financial Position

Skills – e.g. counselling, mental health, communication (written, verbal), interviewing, cultural awareness, suicide prevention/training and negotiation

Ethics – e.g. conflict of interest, boundaries, counselling relationships, cultural awareness, options- client choices; appropriate referral to other services

CPD RULES

CPD points for a membership year are calculated based upon CPD activities according to the following rules and as set out in the table below:

- There must be at least one activity from each of the three CPD categories of technical, skills and ethics.

There is a mandatory requirement to undertake a minimum amount of Facilitated Interactive Training per membership year of 3 points. This is because this form of training is seen as critical for maintaining professional standards. The other requirements applying to Facilitated Interactive Training are:

- All 20 CPD points can be derived from this activity, however you can only claim a maximum of 10 points for any one course.
- A maximum of 6 points per day can be claimed.
- For other activities, the maximum that can be claimed per activity is 10 points per membership year. This is to ensure financial counsellors access a broad range of CPD activities.
- Please note that some activities have lower limits as set out in the table following.



POINTS TABLE FOR CPD

CPD Activity	Points
Attending plenary sessions at a State or FCA conference	Maximum of 2 points per conference
Facilitated Interactive Training e.g. face to face and live webinar	1 hour equivalent to 1 point
Non-facilitated Interactive Training e.g. e-Learning	1 hour equivalent to 1 point
Listen/watch only training e.g. audio-lecture/ podcast/webinar recording	1 point per recording
Preparation and delivery of a training session relevant to the sector	4 points per individual training session
Delivery of a training session relevant to the sector where the material has already been developed	2 points per individual training session
Reading article about technical and educative aspects of financial counselling	1 point per article (max 2 points in a membership year)
Research project contributing to policy work	3 points per project
Contribution of an article on a relevant topic to media/newsletter/association material	1 point per article
Membership of an Association board or advisory committee or of FCA Representative Council	2 points maximum for all memberships combined per membership year
Online questionnaires developed by financial counselling associations that test current knowledge	1 point each, maximum 3 points per membership year
Supervisors only – provision of professional supervision to a financial counsellor	1 point per person supervised (max 4 points in a membership year)
Mentoring a Diploma of Financial Counselling student on placement	1 point per person mentored (max 4 points in a membership year)

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