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“Don’t be frightened to learn about non-accounting subjects. HR, auto enrolment and pensions generally overlap more and more with the work that accounting and tax professionals deal with.”

Tim Birkett FMAAT, Birkett Ferguson Associates

Recording your CPD

Whether you have been selected for CPD monitoring or you are just recording your latest learning activity, this easy to use template will ensure it’s a quick and simple process. CPD can be incredibly rewarding as it keeps your skills and knowledge up to date, and could help you land a new job or even start your own business. Thousands of AAT members benefit from the value that CPD adds to their careers, clients, employers and even their salaries.

The examples shown on page two of this document show a range of activities that can count as CPD, many of which you are probably already doing on a day to day basis. Most activities can easily fit in to your daily schedule, such as listening to a tax update podcast on your commute or joining an AAT webinar while on your lunch break. Most resources are free and can be accessed anytime, anywhere.

On pages three and four you will find the template you need to record your CPD. Remember, the emphasis is placed on the quality and the outcomes of your learning rather than quantity. It’s not important how much time you spend on learning, simply what you gained from it and how you are going to apply it in your professional life.

Don't forget that if you're an AAT licensed member, you'll need to include examples of how you maintain your knowledge in all of your approved services, or across each tier of approved services, as well as in practice management, Anti Money Laundering and general business skills and awareness. Full details can be found in AAT’s CPD policy.

We are here to help you make the most of your CPD. If you have any questions please take a look at our CPD guide or go to aat.org.uk/cpd. If you still have any further questions please email customersupport@aat.org.uk or call us on +44 (0)20 3735 2468. Lines are open 09.00 - 17.00 (UK time), Monday to Friday.

CPD example

“My top CPD tip is to listen to webinar recordings. You can listen at a time that suits you and replay any sections that you want to hear again.”

Guy Dakin MAAT, Berkshire Healthcare NHS Foundation Trust

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| **Full name: John Smith** | **AAT Member ID: 1234567** | **Date of record: 01/08/2019 – 31/07/2020** |

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| **Assess**  Highlight what you need to learn to achieve your career goals and any areas where you would like to improve your knowledge. | **Plan**  What CPD activities will you do to help you improve in this area? | **Action**  Have you completed this CPD? | **Evaluate**  What have you learned from your CPD activity and how will this impact on your work? Is any further CPD required in this area? |
| To be compliant with the new Money Laundering Regulations 2017 | Activity: Read AAT’s guidance on the new Money Laundering Regulations on website  Date: 15 March 2020 | Yes | Provided me with a good overview of the changes in legislation. I will need to do more in depth CPD so I have booked onto the Leicestershire branch event in November. |
| VAT - to understand VAT for international clients | Activity: AAT's e-learning module on VAT and international trade  Date: 2 May 2020 | Yes | Gave me a broad understanding of the area, I now need to find more resources to help fill the gaps and I will meet with my colleagues to share knowledge. |
| Payroll - to understand HMRC rules around tax codes | Activity: HMRC online meeting  Date: 7 July 2020 | Yes | Now up to date on tax codes so I am able to apply them when I run the payroll for my clients. |
| To update my Excel skills | Activity: AAT's Excel e-learning course  Date: 15 July 2020 | Yes | A really useful refresher, good to go through some basic functions which I haven't used for a while. I will be able to use these when producing client data. |
| Bookkeeping - currently no CPD needs in this area as no changes in legislation | Activity:  Date: |  |  |
| To understand Making Tax Digital | Activity: Attend an AAT event on Making Tax Digital  Date: 14 September 2019 | No - event takes place next month |  |
| Tax - to update myself on changes as a result of the budget | Activity: Go through AAT's online resources  Date: November 2019 | No - activity planned for next quarter |  |

CPD template

“I believe we can develop our knowledge and skills in any environment. Even by attending meetings or simply having a conversation. We all learn something new each day.”

Glenn Gosden MAAT, Raymond Brown Construction.

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|  | Activity:  Date: | Yes/No |  |
|  | Activity:  Date: | Yes/No |  |
|  | Activity:  Date: | Yes/No |  |
|  | Activity:  Date: | Yes/No |  |
|  | Activity:  Date: | Yes/No |  |
|  | Activity:  Date: | Yes/No |  |

If you're an AAT licensed member, you'll need to include examples of how you maintain your knowledge in all of your approved services, as well as in practice management and Anti Money Laundering.

CPD template

“If you keep a time sheet, set up ‘CPD’ as a work type. When you need to research something before advising a client, you can then easily record it as CPD.”

Penny Lowe FMAAT, Wellington Consulting

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|  | Activity:  Date: | Yes/No |  |
|  | Activity:  Date: | Yes/No |  |
|  | Activity:  Date: | Yes/No |  |
|  | Activity:  Date: | Yes/No |  |

If you require more support you can find CPD Frequently Asked Questions at **aat.org.uk/cpd/get-started/faqs**.

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