

NB this CPD policy has been replaced and is now only valid until April 2017, for members that joined STEP before April 2014, in order to allow for a transition period. The new policy can be found at [www.step.org/steps-cpd-policy](http://www.step.org/steps-cpd-policy)

# CPD Self-Certification form

## Personal Details

Member's name:

Membership category:  
Please tick box\*

Full [ ]

Seconded [ ]

Non-earner [ ]

Membership number:

## Summary

CPD year:		
	Requirement	Actual
Structured CPD hours	...hours	...hours
Unstructured CPD hours	...hours	...hours
<b>Total</b>	...hours	...hours

I certify the above to be an accurate breakdown of CPD hours.

Signature:.....

Non-core subjects have been included to no more than one half of the required hours

Date:.....

\*Please refer to CPD Guidelines.

# Personal record sheet of CPD undertaken

To be retained by the member for six years

## A. Structured CPD

i) Conferences, seminars, workshops, discussion meetings and other interactive media

Date	Title	Course provider	CPD hours assessed

ii) Preparation of lectures and other forms of presentation (e.g. A presentation to a defined audience)

Date	Lecture/presentation details	CPD hours

iii) Writing for an audience (e.g. Reports, discussion documents, articles)

Date	Title	CPD hours

iv) Forms of learning with interaction with others (e.g. That has a course programme and may have an assessment)

Date	Details	CPD hours
Total of structured CPD.....hours		

## B. Unstructured CPD

i) Reading (e.g. STEP Journal, newspaper reports which result in the maintenance or development of an individual's knowledge of trust and estate work)

	Details	Estimated reading time – hours per

ii) Research and preparation for meetings (e.g. Use of Internet, academic, trade or business journals, government publications, company documentation)

Date	Details	Hours spent

iii) Forms of learning with no interaction with others (e.g. Online media that provides knowledge but involves no discussion or assessment)

Date	Details	Hours spent
Total of unstructured CPD.....hours		