



Campaspe Financial Services Pty Ltd Authorised Representative Continuing Professional Development Plan

Name: Todd Charnas

**Licensee: Campaspe Financial
Services Pty Ltd**

**Supervisor: Campaspe Financial
Services Pty Ltd**

Commences: 01 January 2019

Concludes: 30 June 2020

CPD Plan

Specifically tailored to your individual needs, your CPD plan is designed to help you fulfil your potential as an industry professional and ensure you meet your compliance requirements. We're committed to providing you with the tools to help you thrive in a competitive environment and achieve your best.

Your CPD plan requirements

To ensure you maintain your CPD knowledge and skills requirements, you must successfully complete the learning shown below. You should also refer to your Licensee's CPD policy to ensure you meet their CPD learning requirements. You're required to complete a minimum of 60 points of learning during this CPD year. Any additional learning requirements (if applicable) may be counted towards meeting this target.

CPD plan requirements	Minimum Target (Points)
Total learning requirement	60
FASEA CPD Area(s)	
Technical competence	31.5
Client care and practice	7.5
Regulatory compliance and consumer protection	7.5
Professionalism and ethics	13.5
General	0
Topic Area(s)	
TASA	30
Generic Knowledge	
Financial Planning	4.5
Personal Taxation Issues (financial planning stream)	
Securities	4.5
Derivatives	
Managed Investments	4.5
Fixed Interest	4.5
Foreign Exchange	
Superannuation	4.5
Self Managed Superannuation Funds	2
Retirement Income Streams	4.5
Social Security & Aged Care	
Life Insurance	
General Insurance	
Estate Planning	
Deposit Products and Non-cash Facilities	2.5
Practice Management	
Personal Skills Development	
Skills	
Taxation (specialist stream)	
Ethics	
Margin Lending and Geared Investments	

Note: Topic area(s) may include knowledge area requirements.

Activity(s)	
Online CPD ^{1 2}	
Other CPD (Approved by Licensee E.G.(Conference/PD Days etc) ^{1 2}	60

Notes:

1. A combination of Kaplan Online content, Other CPD (that must be approved by your Licensee) and Formal Education can be completed to meet your 60 hour CPD requirements. You must meet each of the FASEA CPD area targets as well as any sub knowledge area targets indicated.

2. Technical Competence FASEA requirement is a roll up of all your Knowledge Areas (Topic Areas) and is not an additional requirement. Your total requirements may add up to less than 60 CPD hours, however you are required to meet all requirements and a total of 60 hours for this transition CPD year.