



Chartered Banker Institute selects Redland Business Solutions Insight CPD Portal to meet RDR requirements

The world's oldest banking institute, the Chartered Banker Institute has just signed up to Redland Business Solutions' Insight Continuing Professional Development (CPD) Portal to support its Professional Financial Adviser members, post RDR.

The Chartered Banker Institute is the only remaining banking institute in the UK and is known for its very high ethical, professional and technical standards underlined in 2011 when it launched the Chartered Banker Professional Standards Board to enhance and sustain professionalism in banking. Because of this reputation it strives to provide its members with the 'tools' to enable them to meet these standards.

The Institute became an Accredited Body in September 2011 and has been continuing to develop and promote its 'Professional Financial Adviser' (PFA) membership since then.

Whilst the outcomes of the RDR do not currently include mandatory professional body membership, joining one is a way of demonstrating that advisers have achieved and are committed to maintaining high standards of professionalism.

The PFA membership package costs £96 a year and includes:

- The issue of the SPS certificate (providing advisers have met the required standards)
- Authorisation to use the Professional Financial Adviser title, 'PFA' designation and to display the logo
- Access to an online library of resources
- Access to events run by the Institute and partners
- Inclusion on an online register of PFAs
- **Full access to the new Insight Continuing Professional Development (CPD) portal**

The Institute publishes a Statement of Professional Standing Guide "Your Passport to Professionalism", which includes comprehensive details to help advisers understand and meet the new requirements.

http://www.charteredbanker.com/MainWebSite/Resources/Document/CB_SPS_LoRes.pdf

Michele Allen, CPD Manager for the Chartered Banker Institute, says: "We have received a great deal of feedback from our PFA members about CPD, which we have listened to and taken on-board. As a result, we selected Redland's Insight CPD Portal because it is the best CPD solution for advisers in the market."

"Our new CPD Portal will provide guidance to advisers on selecting appropriate CPD activities, help them to complete their CPD efficiently, provide access to a wide array of CPD solutions and an 'eMarketplace' that allows them to browse and find activities of interest to them.

"It is a 'one stop shop', allowing advisers to log a full record of their CPD in one, easy to access location.

“Advisers told us they didn’t want to feel like they were studying for exams again, but they did want:

- a wider variety of CPD to choose from
- more intuitive logging and recording
- a system compatible with mobile devices, helping them log their CPD on the go.

Our new CPD Portal from Redland will provide all of this and more.”

The Institute’s new CPD Portal is also linked to a central CPD Marketplace that provides access to a comprehensive range of CPD solutions created by a range of suppliers, including Taxbriefs, which are free for CIOBS members to use. This means that within the CPD Portal, PFAs will be able to complete their hours of structured and unstructured CPD without any additional cost.

“We will continue to source new CPD material for our PFAs, to extend the range of choice even further, including offering the chance to move towards Associate Chartered Banker and Chartered Banker status , for those who do want to consider enhancing their qualifications,” Michele added.

Mark Walker Smith, Redland’s Business Development Director said: “We are very pleased to be working with the Chartered Banker Institute on this CPD initiative. The combination of our online solution, supported by the Taxbriefs collateral and the Institute’s specialist materials, creates a real ‘added value’ solution for their members.

“The Chartered Banker Institute’s commitment to high standards and professionalism is evident in everything they do for their community. We are very proud to have been selected by one of the Accredited Bodies to provide the CPD solution for their adviser members. The Institute selected our CPD Portal to replace their old system, in direct response to their member’s feedback and requests for more. We will continue to work with them to enhance the offering and extend the range of CPD available to their PFAs.”

The new online portal was launched in December and is accessible to all PFA members of the institute. The Chartered Banker Institute are providing full support and training to assist members in this new system launch.

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