



CPD^{plus} Academy

Turn Your CPD Compliance Into A Competitive Advantage



Learn From Leading Financial Services Industry Professionals

CPDplus helps you stay ahead of the pack by staying up to date with the latest and best training materials created by the industry's leading professionals and financial commentators.



■ ***'Attract and retaining more advisers is the most important focus for us in 2015'***

Attract and retain more advisers at your AFSL by offering your advisers unlimited ASIC RG146 compliance and specialist Financial Services training, at an exclusive per-adviser AFSL-only price.

With Mentor’s customised learning portal you can create your own branded academy – your own logo, your own look and design, your own feel!

Our newly designed colour-coded progress bar has been developed with usability in mind – its practical and functional features allow the user to track CPD points via a progress bar against your training plan total requirements for the year.

Each member of your team has different requirements and needs. Mentor’s CPD allows your staff to customise their training to suit their area of specialisation.

Continuing Professional Development (CPD)

Written by industry leading experts and respected academics.

Mentor's CPD content are videos and articles written by industry experts and respected academics. Mentor is in constant consultation with the key stakeholders in the financial services industry to:

- Identify adviser's needs.
- Provide them with relevant resources to enhance their skills and knowledge.

Each video and article is aligned to a competency area to help advisers meet their compliance requirements in line with ASIC's regulatory guidelines and industry requirements for advisers to maintain their competence at a level appropriate for the adviser service they provide.



CPD Accreditation

Don't waste your time with non-accredited CPD content. All CPDplus articles have been officially accredited by a registered training organisation and by peak industry associations. We continue to work with a broad range of industry groups to provide you with meaningful and holistic CPD solutions.

CPD point allocation and accreditation numbers are shown for each article and in the reporting function within CPDplus.

More than 500 Articles and Videos

CPDplus have more than 500 articles and videos, written by a large range of subject matter experts, leading industry professionals, respected academics and 10 corporate partners.

Competency Areas

- Credit Management
- Client Engagement
- Financial Planning
- General Insurance (Tier 2)
- SMSF
- Securities
- Foreign Exchange
- Margin Lending / Gearing
- Estate Planning
- Succession Planning
- Personal Skills Development
- Fixed Income
- Mortgage Broking
- Generic Knowledge
- Life Insurance
- Superannuation
- Managed Investments
- Derivatives
- Personal Skills Development
- Practice Management
- Aged Care
- Skills
- Compliance
- Cash & Deposit

CPD Assessment

There are four multiple-choice questions pertaining to each CPD article. Subscribers can undertake the assessment by simply:



**Logging onto CPD+ with
your User Name and Password**



**Selecting and reading
the article**



**Undertake CPD
assessment online**

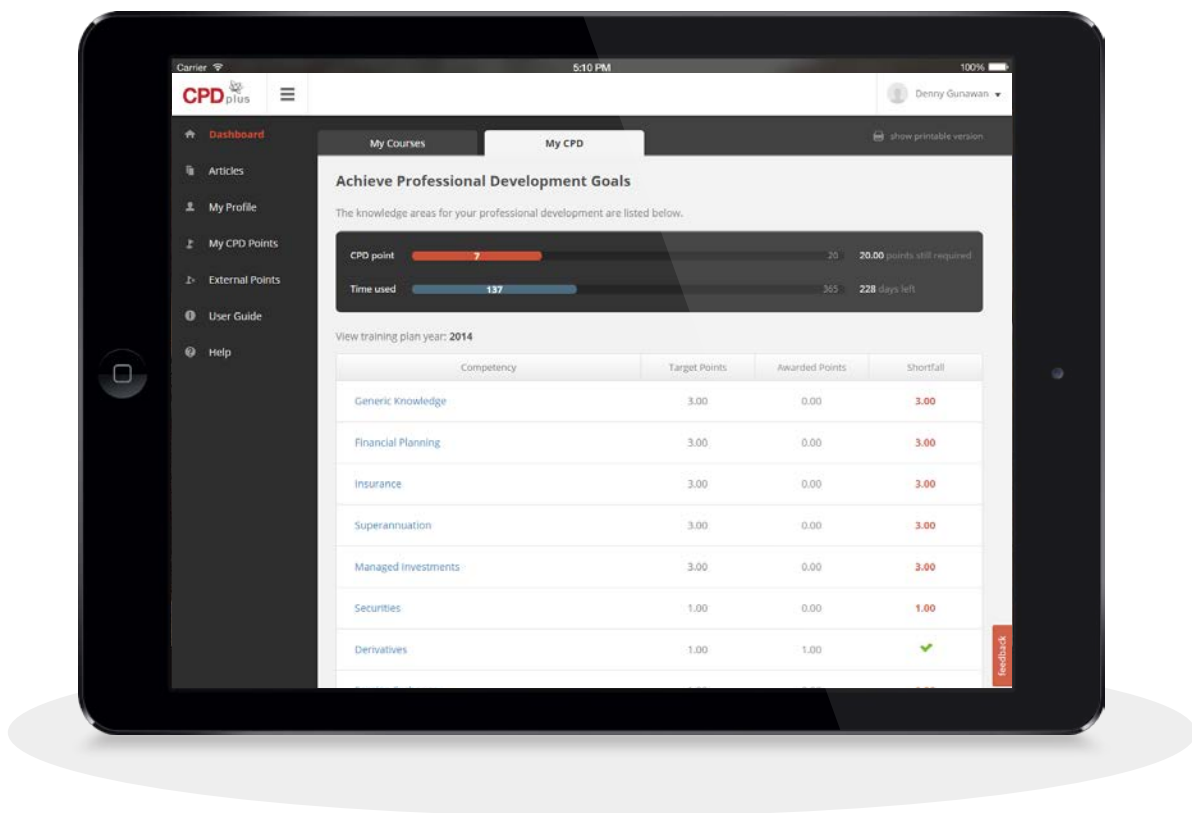
Answer at least three out of four questions correctly, and you will be deemed competent in that area, otherwise you will be advised if resubmission is required. Our friendly and experienced team will provide support and assessment feedback as you progress through your studies.



Take The Hard Work Out Of ASIC's RG146 Compliance Requirements

CPDplus makes it easier to stay up to date with your continuing professional development requirements as dictated by ASIC's Regulatory Guide 146 (RG146) – allowing you to get back to doing what you do best: helping your clients achieve their financial outcomes.

CPDplus - Your Complete Learning Management System



CPDplus is Mentor's state-of-the art iPad compatible online CPD learning management system, which includes topical, relevant and up-to-date content of great interest to the financial services industry.

You are busy enough being a financial adviser and/or compliance manager, so we have built CPDplus to make your life easier. Eliminate complicated user interface, confusing excel spreadsheets and hundreds of emails floating around your organisation. CPDplus takes the pain out of continuous professional development and compliance training and turns it into a complete and rewarding learning experience.



CPDplus is 10 years in the making

After 10 years of collaborating with the world’s leading financial services organisations, CPDplus has a rich and comprehensive feature set to meet virtually any need.

Features	CPDplus	Other Providers
User Access		
Customised CPD Training Plans	✓	✓
Standard CPD Training Plans to choose from	✓	✓
Immediate subscription	✓	✗
Unlimited Telephone and email support during business hours	✓	✗
RG146 Courses and qualifications to choose from	✓	✗
Single Sign-On (recognise that users already logged on to your intranet)	✓	✗
Administration Access		
Customised Reports	✓	✓
Other Training Approval Workflow	✓	✓
Bulk Upload for Professional Development days and conferences	✓	✓
Ability to add your own courses, policies, procedures and induction material	✓	✗
Your own branding	✓	✗
System Integration (API's)	✓	✗
Dedicated Relationship Manager	✓	✗

For Compliance Managers

1 Easily Keep Track of Staff Compliance

On logging in, Compliance Managers are presented with their dashboard showing User Activity in the last 14 days

2 Bulk Upload Points

The Bulk Upload capability, that enables compliance managers to allocate CPD points to all users who attend a Professional Development Day or Roadshow with one simple entry, has now been enhanced to better accommodate multiple speakers and competencies to be allocated in a PD event.

3 External Points: Pending Requests

The External Points Pending Requests is a workflow management system that allows the compliance managers to review and approve all adviser requests for 'other' CPD points in relation to external CPD training such as industry conferences, study and roadshows.

4 Easily Generate and Send Reports

You can use the standard reports, create your own or export data as a CSV or XLS file to import into a spreadsheet for analysis. Type of reports: Points Analysis Report, Group Points Analysis Report, CPD Points Report, External Points Report, CPD Users Report, and Saved Report.

"Mentor Education simply makes our lives easier. Their professional problem-solving approach allows us to focus on other parts of the business; safe in the knowledge that Mentor graduates have what it takes to provide our clients with sound and accurate advice."

Charles Cavallaro

Professional Development Coordinator
Asgard, Securitor, St George



What does my **CPDplus** subscription include?

For Advisers

- 24/7 access to view CPDplus articles for Professional Development, Professional Qualifications.
- Design and tracking of all CPD training (including external training content).
- Dashboard user reports available in real time for CPD points, external points.
- Resource Library of user guide, pocket guides, financial terms and useful links
- Online support from the friendly CPDplus team.

For Managers

- Approved for external points requested by advisers for 'other' training
- Add external points for all advisers who attend a professional development day and allocate CPD points all at once.
- Ability to switch between user and compliance / report view.
- Dashboard management reports available in real time, including saved reports – easy access to your favourite reports, CPD Users, CPD Points, Points Analysis, Group Points Analysis, External Points.
- Online support from the friendly CPDplus team.



Receive a complimentary 30 minute one-on-one demonstration of CPDplus' capabilities

- ✓ Available over the internet or in person
- ✓ Discuss requirements with a CPDplus expert
- ✓ Completely free of charge and no obligation

Call us on **1300 301 146**

or visit www.cpdplus.com

▶ FURTHER INFORMATION

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*Our friendly
student support*

