

SAMPLE

CPDreflect

SAMPLE CPD EVIDENCE PACK

SAMPLE / SYNTHETIC DEMONSTRATION PACK. This document was produced by the public CPDreflect sandbox from a labelled synthetic CPD activity. It is not a customer record, not AI-generated, and not proof of any adviser's CPD. No account was created and no data was saved.

ADVISER

Sample Adviser (synthetic)

EMAIL

sample@example.invalid

PROFESSION

Financial adviser

FIRM / ORGANISATION

Demonstration only — not a real firm

ACTIVITY DATE

12 May 2026

CPD HOURS

1

COMPETENCY

client_needs

ACTIVITY TYPE

Self Study

CPD CATEGORY

Unstructured

SOURCE TYPE

Synthetic

SAMPLE / SYNTHETIC — Vulnerable client file review (written by the adviser)**WHAT THIS CPD COVERED**

I re-read six months of my own file notes for clients recorded as having characteristics of vulnerability, and compared what I had written against the FCA's finalised guidance on the outcomes firms are expected to be able to show. This was my own review of my own files rather than an external course.

53 words

WHY I DID IT (MY DEVELOPMENT NEED)

Two of my clients had a change of circumstances last year — one bereavement, one a health diagnosis — and I wanted to know whether my file notes would show a reviewer what I actually changed about the way I advised them, or only that I had ticked a box saying I had noticed.

54 words

WHAT I LEARNED / CLARIFIED

My notes recorded the vulnerability but very rarely the adjustment: I could not point to what I did differently as a result. I also found that where I had made an adjustment — sending a summary in advance, arranging a second meeting with a family member present — I had not recorded whether it helped or whether the client still wanted it at the next review.

66 words

HOW I'LL APPLY IT IN MY WORK

I am changing my file note template so the vulnerability section has two required lines: the adjustment made, and the outcome at the following review. I will re-check the two files above against that structure before their next annual reviews rather than waiting to catch it at the meeting.

49 words

FOLLOW-UP ACTIONS

Re-check the two vulnerability file notes against the new structure before the end of November.

15 words

Total Word Count: 237

QUALITY VALIDATION: SAMPLE — PASSED (92.0%)

PASS Word Count: Word count: 237 (within 150–2000 range) · PASS Banned Words: No banned or misleading terms found. · PASS Structure: All required sections present and sufficient. · PASS Quality: First-person, specific, and competency-relevant.

ENGAGEMENT SUMMARY

Key metrics documenting the adviser’s human engagement with this CPD activity.

LEARNING OUTCOMES

3 of 3 presented

DEVELOPMENT NEEDS

1 recorded

APPLICATION ACTIONS

1 recorded

ADVISER VERIFICATION

CONFIRMED

Selections recorded: 12 May 2026 09:00 UTC · Reflection recorded: 12 May 2026 10:00 UTC

Free-text context provided: Yes · Professional benefits: 1 of 8 presented · Follow-up commitments: 1 recorded

AUDIT TRAIL OF HUMAN ENGAGEMENT

Professional bodies typically expect reflective statements to address specific personal questions. This section documents the adviser’s guided selections mapped to those expectations. All selections were recorded with the reflection the adviser wrote themselves.

“Did the activity meet my learning needs?”

Human selections recorded — 1 recorded (12 May 2026 09:00 UTC):

[x] A gap I noticed in my own files

Adviser’s free-text input: “Two clients had a change of circumstances last year.”

Learning outcomes selected — 3 of 3 presented:

- [x] Vulnerability notes need the adjustment recorded, not just the flag
- [x] A support need stated once is not the same as one reviewed each year
- [x] The file should show what I did differently, not that I noticed

“How has the activity benefited me professionally?”

Human selections recorded — 1 of 8 presented (12 May 2026 09:00 UTC):

[x] Improved my documentation / audit trail / evidence

“In what ways was it effective / how will I apply it?”

Human selections recorded — 1 recorded (12 May 2026 09:00 UTC):

[x] Change how I record client meetings

“What did I commit to doing next?”

Human selections recorded — 1 recorded (12 May 2026 09:00 UTC):

[x] Re-check two vulnerability file notes by 2026-11-30 — open

All selections above were made by the adviser through CPDreflect’s guided interface and recorded alongside the reflection they wrote themselves. They represent documented evidence of human cognitive engagement with the learning material.

SAMPLE / SYNTHETIC — NOT A REAL VERIFICATION

This pack uses a labelled synthetic adviser and a synthetic CPD activity so visitors can try the Evidence Pack layout without creating an account. It is not a declaration by a real person and is not customer proof.

Guided selections below were chosen in the public sandbox. Section text is deterministic demo wording — not AI-generated. No account was created and no data was saved.

Synthetic label: Sample Adviser (synthetic)

Firm / Organisation: Demonstration only — not a real firm

Session ID: synthetic-own-words-file-review

Demo assembled: 12 May 2026 10:00 UTC

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Session: synthetic-own-words-file-review | Words: 237 | Written by: the adviser, in their own words | Generated: 12 May 2026 10:00 UTC | Exported: 12 September 2026 17:29 UTC

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