



Financial counsellors, who work in community organisations, assist people experiencing financial hardship. Financial counselling is a free, independent and confidential service.

# Continuing Professional Development for Financial Counsellors

This Fact Sheet explains the requirements for **Continuing Professional Development (CPD)** for financial counsellors. **CPD** is an opportunity for financial counsellors to reinforce or acquire relevant workplace skills.

## Professional practice

Financial counselling is a national profession, underpinned by national standards.

The National Standards for Membership and Accreditation require a person working as a financial counsellor, or who wishes to maintain their accreditation, to obtain 20 points of CPD per membership year.

CPD is available through a range of sources including State/Territory peak bodies, FCA, private providers and can include self-instruction, such as reading relevant articles.

## Three categories of CPD

There are three categories of CPD: technical, skills and ethics.

In obtaining 20 points of CPD per membership year, a financial counsellor must include session from each of these categories. Some CPD sessions will cover more than one category.

The examples below are not exhaustive and meant as a guide only.

### 1. Technical (examples)

- relevant legislation
- bank products
- fines
- EDR/IDR
- superannuation
- hardship
- insurance.

### 1. Skills (examples)

- counselling
- mental health
- communication (written, verbal)
- interviewing
- cultural awareness
- suicide prevention/training and negotiation.

### 2. Ethics (examples)

- conflict of interest
- boundaries
- counselling.

## CPD Advice and Availability

State/Territory peak bodies offer professional development

opportunities and can answer questions about professional development and CPD points.

Financial Counselling Australia supports the State/Peak bodies to apply a consistent approach in allocating CPD points. FCA also offers online learning opportunities, such as webinars or online learning modules. The calendar on the FCA toolkit website has details of relevant national training.

## Points Table for CPD

The table below is taken from the National Standards for Membership and Accreditation. The table identifies CPD types and CPD relevant points.

State/Territory peak bodies can provide clarification and guidance about CPD as required.

FCA conference twilight and concurrent sessions attract 3 CPD points.

## Recording CPD

Recording CPD is the responsibility of a financial counsellor. It can be tracked using the “my profile” page of the FCA toolkit website or as recommended by your State/Territory peak body.

CPD Type	Points
Full day training block	6 points
Live attendance at PD lecture or tutorial training session or half day training block	3 points
Preparation and delivery of a training session for financial counsellors	4 points
Preparation of training sessions for community education	4 points
Delivery of training sessions about financial counselling related topics (i.e. where the material has already been developed)	2 points
e-learning session – interactive (e.g. FOS tool)	2 points
Audio-lecture / podcast (listen/watch only)	2 points
Online questionnaires developed by State/Territory associations that test current knowledge	1 point
Research project contributing to policy work	3 points
Contribution of an article on a relevant topic to media / newsletter / association material	1 point
Reading article about technical and educative aspects of financial counselling	1 point (max 2 points)
Supervisors only – provision of professional supervision to a financial counsellor	1 point per person supervised (max 4 points)