

Annual CPD / CPE Planner

Plan learning by quarter, role need, evidence, and practical output.

This downloadable resource is for general learning and organisation only. It is not tax, legal, financial or professional advice. CPD/CPE hours, certificates, exemptions, PER sign-off and qualification requirements must always be confirmed with the relevant official body, provider, employer or regulator.

Planning principle

Start with the skill or responsibility you need to improve, then choose learning that produces evidence and a practical work output.

Quarterly plan

Quarter	Learning need	Planned activity	Topic	Target hours / units	Evidence needed	Completed
Q1	Technical update	Webinar, official guidance or short course	Tax, accounting standard, VAT, payroll or software		Certificate, notes or link	
Q2	Career skill	Course, project or mentoring	Excel, reporting, client communication or management accounting		Project notes or portfolio evidence	
Q3	Compliance confidence	Official training or internal review	AML, GDPR, Companies House, HMRC, ethics or risk		Provider evidence or checklist	
Q4	Reflection and gaps	Review completed learning and plan next year	Role-specific improvement		Reflection summary	

Review questions

- What changed in my role, clients, studies or career target this year?
- Which learning produced evidence I can keep?
- What topic could become a useful Fileminder guide or downloadable checklist?