

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

11 June 2026

CPD HOURS

1

COMPETENCY

Ethical Behaviour & Integrity

ACTIVITY TYPE

Discussion

CPD CATEGORY

Not classified

SOURCE TYPE

Synthetic

SAMPLE / SYNTHETIC — Peer discussion: how each of us evidences client understanding

WHAT THIS CPD COVERED

We each brought two annual review files to the table and compared how we had recorded what the client understood and what they decided. Our compliance lead sat in and told us what she looks for when a file reaches her desk, which was not what either of us had assumed.

51 words

WHY I DID IT (MY DEVELOPMENT NEED)

I had committed at the Consumer Duty conference in May to comparing my outcome evidence against colleagues rather than against the policy, because a policy does not tell you whether your own file notes read as thin to someone else.

40 words

WHAT I LEARNED / CLARIFIED

My notes describe the meeting; my colleague's record the decision the client reached and why. Hers are shorter and evidence far more. I also learned that our compliance lead treats an unrecorded question as an unasked one, which reframes the note as something I write for a reader rather than for myself.

52 words

HOW I'LL APPLY IT IN MY WORK

I am rewriting my annual review note so it opens with what the client decided and in whose words, and I will re-read the last three files I completed to see whether a stranger could tell what the client actually took away.

42 words

FOLLOW-UP ACTIONS

SAMPLE

SAMPLE

Bring the revised outcome-note wording to the next team meeting so the three of us are recording the same thing the same way.

23 words

Total Word Count: 208

QUALITY VALIDATION: SAMPLE — PASSED (92.0%)

PASS Word Count: Word count: 208 (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 of 8 presented

APPLICATION ACTIONS

2 of 9 presented

ADVISER VERIFICATION

CONFIRMED

Selections recorded: 11 June 2026 09:00 UTC · Reflection recorded: 11 June 2026 10:00 UTC

Free-text context provided: Yes · Professional benefits: 2 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 of 8 presented (11 June 2026 09:00 UTC):

☒ Upcoming firm assessment / file review

Adviser's free-text input: “A commitment I made at the Consumer Duty conference in May.”

Learning outcomes selected — 3 of 3 presented:

☒ A colleague's outcome note was shorter than mine and said more

☒ Recording the client's own words changes what the file evidences

☒ Our compliance lead reads for the decision, not for the narrative

“How has the activity benefited me professionally?”

Human selections recorded — 2 of 8 presented (11 June 2026 09:00 UTC):

☒ Improved my documentation / audit trail / evidence

☒ Clarified how to apply guidance in practice

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

Human selections recorded — 2 of 9 presented (11 June 2026 09:00 UTC):

☒ Update templates, checklists, or internal workflows

☒ Share this learning with my team / colleagues

“What did I commit to doing next?”

Human selections recorded — 1 recorded (11 June 2026 09:00 UTC):

☒ Bring the outcome-note wording to the next team meeting by 2026-10-15 — open

WHO TOOK PART

- [x] Two advisers in my team
- [x] Our compliance lead
- Held: In person

Recorded by the adviser as their account of who took part. CPDreflect did not observe this discussion, has not contacted anyone named here, and does not confirm that it satisfies any professional body's requirement for participatory or peer-based CPD.

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 discussion.

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-peer-discussion-fair-value

Demo assembled: 11 June 2026 10:00 UTC

SAMPLE / SYNTHETIC. No account was created and no data was saved. This is not an adviser verification and not customer proof.

Session: synthetic-peer-discussion-fair-value | Words: 208 | Another person took part (as stated by the adviser) | Written by: the adviser, in their own words | Generated: 11 June 2026 10:00 UTC | Exported: 24 September 2026 01:32 UTC

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