

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

18 June 2026

## CPD HOURS

0.5

## COMPETENCY

Business Skills &amp; Personal Development

## ACTIVITY TYPE

Self Study

## CPD CATEGORY

Unstructured

## SOURCE TYPE

Synthetic

## SAMPLE / SYNTHETIC — Practice efficiency self-study

## WHAT THIS CPD COVERED

An article on practice efficiency for small advice firms, covering how to batch client administration, where automation genuinely saves adviser time and where it just moves the work, and how to measure the cost of rework caused by an incomplete fact-find.

41 words

## WHY I DID IT (MY DEVELOPMENT NEED)

My practice has grown to the point where I am spending more evenings on administration than on client work. I wanted a structured way to decide what to change first, rather than buying technology because it was recommended to me and hoping the problem was the one it solved.

49 words

## WHAT I LEARNED / CLARIFIED

The idea I had not considered is measuring rework separately from work. When I estimated how often I go back to a client for information that should have been captured at the fact-find, the number was far higher than I would have guessed. The article's argument is that efficiency improvements aimed at initial data capture pay back several times over compared with automating what follows.

65 words

## HOW I'LL APPLY IT IN MY WORK

I am going to track, for one month, every occasion where I have to return to a client for missing information, and group those occasions by reason. Whichever reason comes top will drive the first change to my fact-find template, instead of the general tidy-up I have been meaning to do for a year.

54 words

## FOLLOW-UP ACTIONS

Add this measurement exercise to my Personal Development Plan and review the results with my paraplanner at the end of the month.

22 words

Total Word Count: 231

**QUALITY VALIDATION: SAMPLE — PASSED (96.0%)**

PASS Word Count: Word count: 231 (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**

**1 of 9 presented**

**ADVISER VERIFICATION**

**CONFIRMED**

Selections recorded: 18 June 2026 09:00 UTC · Reflection generated: 18 June 2026 10:00 UTC

Free-text context provided: Yes · Professional benefits: 1 of 8 presented · Follow-up commitments: 1 of 9 presented

**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 made before the reflection text was generated.

**“Did the activity meet my learning needs?”**

Human selections recorded — 1 of 8 presented (18 June 2026 09:00 UTC):

☒ Process or system change I must implement

Learning outcomes selected — 3 of 3 presented:

☒ Measure rework separately from work

☒ Fixing initial data capture pays back more than downstream automation

☒ Adopt technology against a measured problem, not on principle

**“How has the activity benefited me professionally?”**

Human selections recorded — 1 of 8 presented (18 June 2026 09:00 UTC):

☒ Introduced a new tool, template, or process I can use

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

Human selections recorded — 1 of 9 presented (18 June 2026 09:00 UTC):

☒ Update templates, checklists, or internal workflows

Adviser's free-text input: “Fact-find template change driven by measured rework.”

**“What did I commit to doing next?”**

Human selections recorded — 1 of 9 presented (18 June 2026 09:00 UTC):

☒ Add this to my Personal Development Plan — **completed 02 July 2026**

*All selections above were made by the adviser through CPDreflect's guided interface before the reflection text was generated. 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-practice-efficiency-reading

Demo assembled: 18 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-practice-efficiency-reading | Words: 231 | Model: deterministic-fixture (not AI) | Generated: 18 June 2026 10:00 UTC | Exported: 24 September 2026 01:33 UTC

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