

## Personal Development Plan

### Advice training period

This agreement is made on (insert date here) \_\_\_\_\_

Between \_\_\_\_\_ (the employer) and  
 \_\_\_\_\_ (the trainee)

The purpose of this plan is to set out the agreed learning objectives for the trainee, which have been identified from benchmarking against the competencies profile.

### Period of learning

Date \_\_\_\_\_ Signed by \_\_\_\_\_

Manager/supervisor \_\_\_\_\_

Mentor \_\_\_\_\_

Key competencies to work towards	Examples of work-based learning/ identifying evidence	Examinations/private study	Completion date
<b>Knowledge competencies</b>			
<b>Generic financial services knowledge</b> Has a broad range of knowledge of the financial services marketplace	Experience in the role	Study for R02–R06	Examinations to be passed by _____
	Attending regional PFS meetings (if PFS member)		
<b>Product provider knowledge</b> Has detailed knowledge of relevant product providers	Accompanied meetings with clients	Reading industry journals, etc. Personal research	
	Identify knowledge gaps from supervisor feedback		
	Fill product provider knowledge gaps		
<b>Company procedures</b> Is familiar with the company's procedures	Study complex products		Achieves production performance indicators (production and quality) by _____
	Fill company procedures and advice process knowledge gaps		
<b>Business experience</b> Understands general business principles and the application to the company's business	Know business and own objectives		Competent adviser by _____
Knowledge competencies to work towards	Examples of work-based learning/ identifying evidence	Examinations/private study	Completion date
<b>Skills competencies</b>			
<b>Analytical thinking</b> Able to assess information, make comparisons and identify critical features	Identify needs, compare relative benefits of products and make recommendations		
<b>Self management</b> Able to operate with little supervision	Setting production goals and reviewing progress		
<b>Planning and organisation</b> Able to use time and resources effectively to deliver results required	Plans work to meet deadlines		