

Dealer Group information for AdviserTECH CPD

Your dealer group does not currently exist in our AdviserTECH CPD database.

We require this information to correctly set up your dealer group in AdviserTECH CPD, please fill out this form with your dealer group details.

Dealer Group details

Client Name _____

ABN _____

AFSL number _____

Address _____

Compliance Manager _____

Email address _____

Is this Dealer Group is paying for advisers to access AdviserTECH CPD? YES/NO

Permissions (please circle)

Allow Users to upload external CPD activity? YES/NO

Allow Users to delete external CPD activity? YES/NO

Allow Users to edit external CPD activity? YES/NO

Allow Practices to upload external CPD activity? YES/NO

Allow Practices to delete external CPD activity? YES/NO

Allow Practices to edit external CPD activity? YES/NO

Minimum point requirements (optional)

This section allows you to determine minimum CPD point requirements for your advisers for each subject area outlined below. (i.e. if your dealer group does not use SMSFs enter in 0 minimum points required for SMSF)	Minimum CPD points required per year in subject
Transition to retirement	
Retirement	
Investments	
Tax	
Insurance	
Social security	
Estate planning	
Self managed superannuation funds (SMSF)	
Ethics	
External CPD points (e.g. are at least 2 CPD points required from conferences)	
Total minimum points required per year (please note this may be more than sum of AdviserTECH CPD and external CPD activity) (i.e. CFP advisers will require more CPD points per year than non CFP advisers)	

For subscription enquiries please call Midwinter on 1300 882 938. Please return this form to **fax (02) 9233 4485**, or mail to **Suite 2, Level 14, 111 Elizabeth St, Sydney NSW 2000**