

# RDR qualifications gap fill tool: 4 steps to success



Using the RDR qualification gap fill tool is simple and straightforward. It will help you address any knowledge gaps you may have and in doing so meet the FSA qualification requirements.

To get your gap fill activity on track, we recommend you follow 4 steps:

## 1 Get an overview of where you currently stand

The **'RDR overall completion status'** provides a summary of the progress you have already made towards meeting the overall RDR qualification requirements (beyond the current minimum exam standards for practising advisers). This is shown as 'X of 132', with 'X' being the number of learning points (these being what an adviser is to know, understand or do as a result of a process of learning) completed against the total of 132 covering the five exam standards, these being:

- Financial services, regulation and ethics
- Investment principles and risk
- Personal taxation
- Pensions and retirement planning
- Financial protection

The completed learning points are populated via a mapping exercise between the CII exams you have passed and/or any additional relevant learning that you have undertaken and personally recorded on the website.

The 132 learning points are the potential knowledge gaps identified by the FSA as the core issues that advisers holding a transitional qualification must have covered.

**Important note:** At launch relevant CII examinations typically passed as far back as since 1992 have been mapped against the core FSA exam standards and uploaded to this tool. Details of relevant CII exams passed from 1982–1991 are currently being mapped and will be uploaded by 29 October.

## 2 Identify your knowledge gaps in detail

Having gained a general sense of the size of task, you now need to understand in detail the particular knowledge gaps you have.

Viewing **'RDR subject completion status'** will give a breakdown of your progress against the learning points for the 5 individual exam standards.

By clicking on a subject you will bring up details of the learning points for that exam standard, detailing exactly what learning it is that you:

- have undertaken, or
- need to undertake (you can plan your activity here also).

**Useful tip:** Use the **'Incomplete'** link under **'Filter by Status'** to only view the learning points you are still to address. These are shown as red crosses (the green ticks indicate completed).

## 3 Add evidence of additional gap fill activity

You may have already undertaken development activity that satisfies what are currently shown as knowledge gaps (e.g. in-house training, an event or non-CII study).

Adding evidence of gap fill activity is quick and simple. Once added, your gap fill status will automatically update.

**Note:** The tool currently doesn't automatically record any relevant PFS event activity which matches against the learning points. However, this functionality is in development for introduction in the Autumn. This will include retrospective PFS events dating as far back as September 2008.

## 4 Build your gap fill activity plan

To address your remaining knowledge gaps you'll need to plan the development activity you wish to undertake. Remember: use the **'Incomplete'** filter to isolate learning points needing to be addressed.

Although advisers with competent adviser status as at 30 June 2010 typically have until the end of 2012 to address identified knowledge gaps, we would strongly recommend that you plan to address these well in advance of the deadline. Failure to address all knowledge gaps by the deadline will result in the withdrawal of authorisation to advise.

### PFS/CII member support

The PFS and CII are developing a range of solutions to help members to bridge their knowledge gaps, including providing members with sufficient free content to satisfy their potential compliance obligations. Roll-out will commence at the end of September, monitor [www.thepfs.org/gap-fill](http://www.thepfs.org/gap-fill) for details.

## Getting the most from the gap fill tool

In addition to its simple-to-use functionality, the qualification gap fill tool is packed full of support features to ensure you get the most from this service.

### Support features include:

- Comprehensive frequently asked questions
- Pop-up guidance found wherever you see the information symbol
- A user walk-through demonstrating all the key features and functions.



[www.cii.co.uk/gap-fill](http://www.cii.co.uk/gap-fill)