

Skills and expertise

See the skills your firm needs against who holds them, and plan how to close the gaps.

Extra tool for financial advice firms

● What it is for

A matrix of the skills your firm needs, the people who hold them and at what level, so you can show you reviewed your expertise and are closing the gaps. Extra tool for financial advice firms.

● How to use it

1 Choose the skills you need

Go through the starter list. For each skill say **Yes, we need it**, the level needed and how many people should hold it. Tick the box if a director or manager must hold it. Add your own skill at the bottom if one is missing.

2 Add the people

Add each person with their name and role, or select **Add my CPD-register advisers**.

3 Rate each person

For each person and skill, choose None, Awareness, Working or Expert.

4 Spot the gaps

The coverage section flags **Nobody at the level**, **Too few people** and **No director or manager**.

5 Plan to close each gap

Select **Plan how to close this**. Choose the approach, owner, due date and status, and explain if you are accepting the gap. Select **Save plan**.

6 Save a snapshot

Select **Save a dated snapshot** each time you review, so you have a record of where you stood.

● Before you start

- List the roles in your firm.
- If you use the CPD tool, your advisers can be added in one step.

● Good habits

- Review the matrix at least once a year.
- Re-check it after anyone joins or leaves.
- The scale and starter skills are our suggestions. Your firm remains responsible for its own assessment.

● How you sign in

Opens with your private link. No password to manage.

Verfapp supports your compliance. It does not certify it, and it is not legal advice. Screens shown use sample data.

Need a hand?

We are happy to walk you through it.

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