**H D Consultants – Provider presentation notes and actions, and CPD log**

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| **Company** |  |
| **Presenter** |  |
| **Date** |  |

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| **Topic / Subject** | **Notes** | **Client name(s) who could benefit from this** | **POST MEETING ACTIONS TO BE CARRIED OUT**  **e.g. TO CALL / TO EMAIL / TO SEE?** |
| *e.g. income protection* | *e.g. deferred periods up to 5 years, age-costed, great for self employed* | *e.g. A. Great-Client – income protection, and life cover for his family* | *e.g. MUST send life cover and PHI quotes to A. Great Client* |
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**CPD NOTES**

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| **TOPIC** | **LEARNING / OUTCOME** | **CPD TIME** |
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