

## CII Pension Transfers (AF7) Study Programme – April 2019 Exam

Sheffield CII: Life & Pensions Society are pleased to offer a two-day study programme in preparation for the April 2019 sitting of the AF7 exam, in association with The Financial Adviser Academy.

**DATES** Thursday 7<sup>th</sup> & Friday 8<sup>th</sup> March 2019

**LOCATION** AMP Technology Centre (Bessemer Room), Catcliffe Sheffield.

**COST** £250 including all course material

### COURSE CONTENT

DAY 1	DAY 2
Sitting in the Examiner's shoes	Review of day one mini-mock
The transfer process	Implications of transfers out of DB
The Regulators	Safeguarded benefits
Roles and responsibilities	Receiving scheme features
Advice process	Investment and capital risk
Key stages	Key issues arising:
Factors to compare	PCLS
TVAS	Cash incentives
	Funding/solvency
	Divorce
	Overseas
End of day mini-mock	Case study analysis – should I stay or should I go?

### ABOUT THE TRAINER

Steve Davis is a CII -accredited trainer at advanced level with over 1,000 CII exam credits. Find out more about Steve and The Financial Adviser Academy via the following link: <http://www.financialadviseracademy.org.uk/meet-the-team>

### HOW TO BOOK

A maximum of 12 will be accommodated on this course. To reserve your place or with any questions, email [Owen.Wright@investecwin.co.uk](mailto:Owen.Wright@investecwin.co.uk) or tel. 0114 275 5100.

**Please note attendance will be secured only on receipt of payment of full course fee.**