

CII Pension Planning (AF3) Study Programme – April 2017 Exam

We are pleased to offer a three-day study programme in preparation for the April 2017 sitting of the CII Pension Planning (AF3) exam, in association with The Financial Adviser Academy.

DATES 6th 13th and 20th March 2017
LOCATION Aviva Pomona Building, Pear Street, Sheffield S11 8JJ
COST £375 to include all course material, lunch and refreshments

COURSE CONTENT

DAY 1	DAY 2	DAY 3
Exam technique	Review of mini-mock	Review of mini-mock
Annual allowance: <ul style="list-style-type: none"> • MPAA • Tapering • Carry forward 	Early leaver rights Transfers PPF Trustee issues	Lifetime allowance PCLS and fund protection Benefit options
Tax relief	SSAS vs SIPP	Drawdown / UFPLS
Death benefits	State pensions	Triviality
Set mini-mock and work for day 2	Set mini-mock and work for day 3	Final review and next steps to passing

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

Places on this course are expected to be extremely limited. To reserve your place or with any questions, email 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.