

## CII Pension Transfers (AF7) one-day intensive course

Sheffield CII (Life & Pensions Society) are pleased to offer a limited number of places on our AF7 one-day course. Its aim is to prepare you in four of the key elements attracting marks in the AF7 syllabus.

**DATES** 6<sup>th</sup> September 2017

**LOCATION** Aviva Pomona Building, Pear Street, Sheffield S11 8JJ

**COST** £150 to include all course material, lunch and refreshments

### COURSE CONTENT

<b>1. Sitting in the Examiner's shoes – how marks are won and lost</b>	
<b>2. The transfer process:</b> <ul style="list-style-type: none"> <li>• Key stages</li> <li>• Main comparison factors to analyse</li> <li>• TVAS</li> </ul>	<b>3. Main issues arising from:</b> <ul style="list-style-type: none"> <li>• Lifetime allowance</li> <li>• Transitional protection</li> </ul>
<b>4. Transferring between different scheme types:</b> <ul style="list-style-type: none"> <li>• Risk</li> <li>• Death benefits</li> <li>• Charges</li> <li>• PCLS</li> </ul>	<b>5. Main advice issues:</b> <ul style="list-style-type: none"> <li>• DB to DC</li> <li>• BCEs</li> </ul>

### 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](mailto:Owen.Wright@investecwin.co.uk) or tel. 0114 275 5100.

**Attendance will be secured only on receipt of payment of full course fee.**