

Cii R04 Pensions And Retirement Planning Study Text

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Pensions and retirement planning (R04) The objective of this unit is to develop knowledge and understanding of and ability to analyse pension and retirement planning issues. Download 2019/20 syllabus (PDF) Download 2019/20 exam guide (PDF)

Pensions and retirement planning

Pensions and Retirement Planning (R04) is a core unit for the Diploma in Regulated Financial Planning which meets the FCA's qualification requirements for retail investment advisers. This unit is relevant for paraplanners, technical consultants and those in financial planning support roles.

Pensions and Retirement Planning (R04)

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Diploma units are assessed by multiple-choice question exam (MCQ) (R01, R02, R03, R04, and R05), and a written case study based exam (R06). For online MCQ exams, result notification is immediate on completion. For paper-based MCQ exams, results are released five weeks' following the exam sitting.

Diploma in Regulated Financial Planning - cii.co.uk

R04 Examination Guide 2018/2019 3 Unit 4 – Pensions and retirement planning Based on the 2018/2019 syllabus examined until 31 August 2018 Introduction This examination guide has been produced by the Examinations Department at the Chartered Insurance Institute (CII) to assist students in their preparation for the R04 examination.

Cii R04 Pensions And Retirement Planning Study Text

R04:Pensions and retirement planning study text, 2020–21 edition. This edition of the study text is based on the 2020–21 examination syllabus and forms the study material for exams to be sat from 1 September 2020 until 31 August 2021. Updates and amendments have been made throughout the text; where relevant, web updates issued for the 2019–20 edition have been included.

R04: Pensions and retirement planning study text, 2020–21 ...

Not wishing to spend retirement watching daytime TV he decided to become a freelance trainer specialising in helping people to pass the CII's Financial Services exams. John is a Chartered Insurance Practitioner and a Fellow of both the Chartered Insurance Institute and the Personal Finance Society. ... R04 Pensions and retirement planning ...

R04 Pensions and retirement ... - CII Local Institutes

Pensions and retirement planning Purpose At the end of this unit, candidates should be able to demonstrate an understanding of and ability to analyse:

Pensions and retirement planning

CII R04 Exam: Pensions and Retirement Planning. The CII's R04 exam focuses on pensions and retirement planning. It forms a part of the Diploma in Regulated Financial Planning. It is a 1-hour multiple-choice question paper consisting of 50 questions, with a nominal pass mark of 65%. The exam syllabus covers the tax and legal frameworks relevant to pension schemes; defined contribution and defined benefit pension schemes; options for drawing pension benefits; state retirement benefits and ...

CII R04 Exam Revision Help | R04 Exam | Brand Financial ...

R04 Examination Guide 2018/2019 3 Unit 4 – Pensions and retirement planning Based on the 2018/2019 syllabus examined until 31 August 2018 Introduction This examination guide has been produced by the Examinations Department at the

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Chartered Insurance Institute (CII) to assist students in their preparation for the R04 examination.

Unit 4 Pensions and retirement planning

CII LP3 Life and Pensions Principles and Practices; R0 Exams; CII R01 Financial Services, Regulation and Ethics; CII R02 Investment Principles and Risk; CII R03 Personal Taxation; CII R04 Pensions and Retirement Planning; CII R05 Financial Protection; CII R06 Financial Planning Practice; CII R07 Advanced Mortgage Advice; Other Exams

The Oct 20 CII R06 Exam in Review | Brand Financial Training

The session takes place at K2 Leisure Centre, Crawley and opens for registration at 9.00am for a 9.30am start and ends at 4.45pm, providing six hours' CPD. The cost of this course is £65 for CII/PFS members (£85 for non-members) and includes all tuition, tea/coffee on arrival and during formal breaks and a buffet lunch. Please visit our friends at Sussex Insurance Institute to book your place

R04 Pensions and Retirement Planning

knowledge@cii.co.uk. CII study texts Pensions and retirement planning. London: CII. Study text R04. Books A modern approach to lifetime tax planning for private clients (with precedents). Christopher Whitehouse, Lesley King. Bristol: Jordans, 2014. CCH Tax planning: individuals 2016-17. Paul Robbins. Kingston: Wolters Kluwer, 2016.

Pensions and retirement planning - cii.co.uk

The R04 pensions and retirement exam is based in 50 multiple choice questions. The exam is 1 hour long and you will need to score 65% or more to pass the exam. The R04 exam uses two types of multiple choice questions; standard format and multiple response format. With standard format questions, you will be given four options and only one will be correct. In R04, 39 of the 50 questions will be of this type.

CII R04 Pension Retirement Planning | Exam Audio | R0exams ...

R04 Pensions and Retirement Planning - February 2018. K2 Leisure Centre. Thursday, 22 February 2018. ... The cost of this course is £65 for CII/PFS members (£85 for non-members) and includes all tuition, tea/coffee on arrival and during formal breaks and a buffet lunch.

R04 Pensions and Retirement Planning - February 2018

To complete the Certificate in Pension Transfer Advice you must hold CII units R01, R02, R04, and AF7. Because you hold unit AF7, this in combination with an RDR Compliant qualification for Activities 4 and 6 will meet the Qualification Requirement as of 1 October 2021. (R01, R02 and R04 are three of the six units that comprise the CII Diploma in Regulated Financial Planning which is an RDR Compliant qualification for Activities 4 and 6.)

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Certificate in Pension Transfer Advice

The Chartered Insurance Institute R04 exam covers pensions and retirement planning at level 4 and is a compulsory step towards achieving the Diploma in Regulated Financial Planning.

R04 Exam: Pensions and Retirement Planning | Brand ...

CII LP1 Life and Pensions Customer Operations; CII LP2 Financial Services Products and Solutions; Exam-Col-04. CII LP3 Life and Pensions Principles and Practices; R0 Exams; CII R01 Financial Services, Regulation and Ethics; CII R02 Investment Principles and Risk; CII R03 Personal Taxation; CII R04 Pensions and Retirement Planning; CII R05 ...

CII R04 Study Notes | R04 Exam | Brand Financial Training

PFS Exam Study Course - R04 Pensions and Retirement Planning - February 2018. K2 Leisure Centre. Thursday, 22 February 2018. 9:00 am – 4:45 pm. John Trayner, CII Approved Trainer; ... The cost of this course is £65 for CII/PFS members (£85 for non-members) and includes all tuition, tea/coffee on arrival and during formal breaks and a buffet ...

PFS Exam Study Course - R04 Pensions and Retirement ...

Led by a CII certified trainer, this one day training course costs £65 for members (non-members £85) and is suitable for candidates studying for their R04 and AF3 exams in 2017. By the end of the day delegates will be able to: understand the economic and demographic pressures on providing income in later life understand the legal restraints on saving into a pension product calculate accurately ...

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