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RO4 (Pensions and Retirement Planning) Pre Exam Training, Wednesday 26th September, Fareham

The Hants and Dorset PFS Regional Committee in association with the Insurance Institute of Southampton have organised a training day for those members who are studying for and taking the RO4 examination. Priority will be given to Hampshire based members of the PFS Hants and Dorset Region.

The cost of the day's training will be £35. Your attendance will be confirmed once the member has paid the fee invoice. There is a maximum of 15 attendees. If we are oversubscribed, you will be placed on a waiting list.

The day will commence at 0915 sharp (please arrive by 0900) and finish by 1645.

The venue is the offices of Brooks MacDonald, The Long Barn, Dean Estate, Wickham Road, Fareham, PO17 5BN.

The RO4 preparation day aims to increase your chances of passing the exam.

The course objectives are:

By the end of the course, delegates will have covered the key elements of the RO4 syllabus with the emphasis being on the CII Learning Outcomes, been introduced to the exam format and been given exam hints/revision tips so as to be able...

- To understand the political, economic and social environment factors which provide the context for pensions planning
- To understand how the HM Revenue & Customs (HMRC) tax regime applies to pensions planning
- To understand the relevant aspects of pensions law and regulation to pensions planning

- To understand the structure, characteristics and application of Defined Benefit (DB) schemes to an individual's pensions planning
- To analyse the range of Defined Contribution (DC) scheme options as they apply to an individual's pensions planning
- To analyse the options and factors to consider for drawing pension benefits
- To understand the structure, relevance and application of State schemes to an individual's pension planning
- To evaluate the aims and objectives of retirement planning, including the relevant investment options

The course will be led by Phil Ahern, who is an accomplished, qualified and experienced trainer working in a financial services environment for over 35 years and specialising in the CII professional qualifications exams and generic training in pension, investment, protection and mortgage products within the regulatory environment.

To attend, please email the Hants and Dorset PFS Regional Committee on hantsanddorsetpfs@outlook.com and your attendance will be confirmed on payment of the £35 course fee.