



Pensions
Management
Institute

ACHIEVING PENSIONS EXCELLENCE

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THE PENSIONS MANAGEMENT INSTITUTE

ADVANCED DIPLOMA IN RETIREMENT PROVISION/DIPLOMA IN RETIREMENT PROVISION/DIPLOMA IN INTERNATIONAL EMPLOYEE BENEFITS/ DIPLOMA IN REGULATED RETIREMENT ADVICE

STUDY MATERIAL PACKAGE: NOTES FOR STUDENTS

2018 VERSION

Thank you for purchasing this study material package. We hope this will be a valuable aid to study and preparation for the examination. In order to obtain the most benefit from the course please read the following notes carefully. They explain how the course works and how to maximise your advantage from taking the course.

If you have any questions please contact us on qualifications@pensions-pmi.org.uk or 020 7392 7400

WHAT IS INCLUDED?

Your study material package provides access to an online learning programme which includes:

1. The Study Manual

This contains the information you need for the course and recommended reading (where applicable). The syllabus is printed at the front of the manual. Please read this carefully; the examination is based on this. Check that you have the correct manual for the examination you are sitting. This is found in the Resource Centre of the programme.

The examinations in 2018 will be based on the law as it existed at 6 April 2017. An awareness of any significant changes after 6 April will be to a candidate's advantage. Therefore, the study manuals will be based on the law as it existed at 6 April 2017 unless stated otherwise.

2. Communication Manual (Specialist Units Only)

As the specialist units also test communication skills this manual contains the information you need for the course and some recommended further reading in this area. It outlines the different types of format that may be requested in the examinations and expectations in this area. Further details on this aspect can be found in the individual unit test specifications. NB. This Manual was updated for 2016 examinations and no changes have been made to the 2016 edition which remains applicable for 2018 examinations.

3. Assignment Questions

A series of assignments to be completed and submitted to your Tutor. Please note the Parts and/or chapters to be studied before attempting each assignment and the time recommended for each assignment. These times are recommendations. These are found in the Learning Centre of the programme.



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In the Core Units these assignment questions cover only the short answer type questions which will account for approximately half of the examination. Sample multiple choice type questions (which will account for the other half of the examination) are available separately.

HOW DO I GET STARTED?

Please follow the instructions on the First Time Registration document that was attached to the e-mail with your access key.

You will then need to complete the Student/Tutor Information Form.

This form is retained by your Tutor who may be able to help you more effectively if he/she knows something about your background.

THE ONLINE LEARNING PROGRAMME

The online learning programme contains two important areas: the Resource Centre and the Learning Centre. Further information about these can be found within the programme.

The following important documents can also be found within the programme:

- **Study Timetable**
This suggests dates for the submission of your assignments and may help you to plan your study more effectively. It also states the closing date for submission of assignments, i.e. the last date when assignments must be with your Tutor. Assignments submitted to Tutors after this date will not usually be marked. This can be found in the Resource Centre.
- **Colourboxx Scheme**
This is an example company used to illustrate various pension arrangements - it is referred to in some of the study manuals and assignments. It is not used in the examinations. This can be found in the Resource Centre.
- **Pensions Terminology**
The current 2011 edition can be found in the Resource Centre.
- **Test Specifications, Sample Questions and Past Papers**
In conjunction with the revised syllabus for 2016 onwards examinations, the test specifications and assessment formats changed and further details including sample questions are available in the Resource Centre.

DRAFTING YOUR ASSIGNMENTS

You are likely to obtain better marks if you:

- plan your answer carefully and arrange the content logically;
- **type up your answers then cut and paste them into the answer box provided.**
- ensure that your answer is relevant to the question set;
- use any technical terms correctly - you should check these in "Pensions Terminology";



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- take care with spelling and bad grammar. Not only do errors create a bad impression but also they may obscure your meaning and detract from the communication/style marks available;
- bear in mind that each assignment is designed to take about 3 hours to complete in the specialist units and approximately 1 hour in the core units mirroring the examination. Obviously this is distorted by the online nature of this system whereas the examinations will be handwritten;
- use the correct format and appropriate language. This applies more to some of the later specialist units where you may have to write a letter or a report. You should not, for example, use unexplained technical terms in something intended for a pensioner;
- use your own words. Copying from the manual is not necessarily “wrong” for the assignments; however, in the examination it will not be possible for you to reproduce the exact wording of the manual. For this reason tutors are unlikely to be able to mark assignment question answers that have been copied. It is more beneficial for your learning process if you try to express answers in your own words. By doing this you will quickly identify those parts of the manual that you have not immediately understood.

QUERIES ON THE STUDY MATERIALS

You will see that PMI study materials have been produced in conjunction with a variety of study support partners. You can find further details of these partners and the authors of the materials in the study manual.

However, if you have any queries on the content of the material please contact Qualifications at PMI in the first instance e-mail qualifications@pensions-pmi.org.uk or 020 7392 7400.

SUBMISSION OF ASSIGNMENTS

When you have completed your **first** assignment in any Unit:

Use the “submit for marking” button located on the home page of each assignment.

We will allocate you to a Tutor for that unit and inform them that they have something that needs marking; we will also send you an email to confirm that we have received your assignment notification and inform you that you have been set up with a tutor.

When your Tutor has marked your assignment, you will receive an email notification.

All your subsequent assignments in that unit will be submitted automatically once you click the “submit for marking button”

NB The submit button under each question allows you to save your work but does not submit it for marking.

All Units have a mock examination. Ideally this should be completed under examination conditions and then copied into the online system and sent to your Tutor.



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HOW TO USE THE STUDY MATERIAL PACKAGE EFFECTIVELY

Start the programme as early as possible to give yourself ample time to complete all the assignments and the mock examination and allow plenty of time for revision before the examinations.

Study the required Parts and/or chapters of the manual (indicated at the beginning of each assignment) and the self test questions thoroughly before attempting each assignment.

Do not submit more than one assignment at a time to your Tutor; you should wait for one assignment to be marked and returned before submitting the next. Tutors often make constructive comments for you to apply in subsequent assignments, which will help you to gain best advantage from the study material package.

Try to follow the recommended study timetable and try to submit work regularly.

Tutors are asked to give priority to those Students who begin the course early and submit work regularly.

YOUR MARKED ASSIGNMENT

*We try to ensure that assignments are marked within **10 working days** of you submitting them. Please contact Chris Eyett on 020 7392 7414 or onlinelearning@pensions-pmi.org.uk if you have not received feedback after 10 days.*

Please note that sometimes the automated alerts that are generated when an assignment is submitted for marking or when marking is completed get caught in spam filters/firewalls. This can either delay the allocation of assignments to a tutor for marking or the notification that marking has been completed.

When you receive your marked assignment:

- Look at the mark to give you an idea of the standard of your answers. Remember that if you have exceeded the time limit or referred to your notes or study material while writing the assignment your mark is likely to be higher than under examination conditions.
- Read through your Tutor's comments and the assignment notes to discover how your work may be improved. Try to learn from past mistakes; this is why we strongly recommend you not to submit your next assignment before the previous one has been marked.
- If there are still points about which you are unclear you can always ask your tutor for further clarification. There are also several other sources of help outlined below.

NB The assignment notes are **not** model answers. They should be used, as suggested above, in conjunction with your marked assignment to provide guidelines for what your answers should include.

OTHER SOURCES OF HELP THAT MAY BE OF INTEREST

You might find some of the options below helpful:

Colleagues

It is surprising how often colleagues are able to assist when you are having difficulty understanding a particular section in the syllabus. Do not forget to make use of their expertise.



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Regional Groups

PMI has a network of regional groups which exist to provide support for Members in their particular area. Details of the regions and their activities can be found on the PMI website.

Conferences and Seminars

PMI holds a range of conferences and seminars at which topical subjects are spoken on and discussed. Students may attend these events at a reduced fee. Details of conferences and seminars are sent to all Members in PMI News and can be found on the PMI website.

Board of Examiners' Report/Past Examination Papers

These can be a valuable aid to revision. They can be downloaded from the PMI website.

Websites

Much relevant information can be found on websites, the links page on the PMI website is a good place to start.

Revision Courses

PMI holds revision courses in central London immediately before the April and October examinations. The courses consist generally of half day sessions for each module. Full details will be available on the website.

PMI TV

PMI TV is an online TV channel offering a selection of topical, relevant and informative programmes for pensions professionals.

AND FINALLY.....

We aim to make the course as effective as possible for Students who choose this method of study. Please contact us if you do experience any difficulties. We also welcome any comments on the study material that we review every year and amend if necessary.

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