



**Pensions
Management
Institute**

Moving pensions forward

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1. Outline the information requirements an employer must meet to comply with its automatic enrolment duties. (5 marks)

2. List the key activities that a DB scheme should complete within 2 years of its winding up date as set out in guidance issued by the Pensions Regulator. (8 marks)

3. Describe the investment related activities which trustees may delegate to external providers. (10 marks)

4. Outline the factors that determine the benefits that are payable when an active member leaves pensionable service. (5 marks)

5. List the records that must be retained by pension schemes as set out in The Registered Pension Schemes (Provision of Information) Regulations 2006 (as amended). (5 marks)

6. Outline the conditions that must be met in order for a scheme to pay a trivial commutation lump sum. (10 marks)

7. When pension rights are crystallised explain how they are valued for the purposes of checking whether they exceed the Lifetime Allowance. (7 marks)