

THE PENSIONS MANAGEMENT INSTITUTE

ADVANCED DIPLOMA IN RETIREMENT PROVISION

ACCREDITATION OF PRIOR LEARNING

PMI is prepared to consider granting credits towards the Advanced Diploma in Retirement Provision (formerly known as exemptions) to holders of professional qualifications or degrees. These take the form of credits against specific units. The granting of such credits is at the discretion of PMI and is not automatic.

Professional Qualifications

Applicants should submit evidence of the qualification held and enclose the appropriate fee. A form is available on the website.

Notes

- (1) Applications can be made when applying for PMI Membership or any time afterwards.
- (2) Original certificates or photocopies which are certified as true copies of the original by their employer must be provided.
- (3) Credits will not be granted on the basis of partly completed professional qualifications or on the basis of experience alone.
- (4) It is not possible to apply for credit from a unit that has been previously failed.

Fees

These are on the website.

Degrees and Professional Qualifications not listed below

The following list is for guidance only. It does not preclude applications from holders of other professional qualifications or degrees. In these instances the applicant must submit details of the examinations passed and the syllabuses studied. Applicants must indicate the extent of syllabus overlap. Considerable overlap is required for credit to be considered.

This is a list of qualifications that are encountered most frequently. It is not an exhaustive list and qualifications not listed may be eligible for credit. Please contact PMI in these cases.

Awarding Body	Credits
Actuarial Qualifications Fellows and Associates by examination of the Institute and Faculty of Actuaries (or equivalent)	Core Units 1A - 4
Accountancy Qualifications Institute of Chartered Accountants in England and Wales (and Scottish and Irish equivalents), Chartered Association of Certified Accountants, Chartered Institute of Management Accountants, Chartered Institute of Public Finance and Accountancy	Core Units 1A, 2 and 4
Chartered Insurance Institute All Fellows All Associates (Prior to 2004) Advanced Diploma in Financial Planning* Diploma in Financial Planning/Regulated Financial Planning*	Core Units 1A-3 Core Units 1A-3 + Taxation, Retail Investment and Pensions Core Units 1A and 2 + Taxation, Retail Investment and Pensions
The Chartered Institute for Securities & Investment (CISI) Investment Advice Certificate (IAC) Investment Advice Diploma (IAD)	Core Unit 4 Taxation, Retail Investment and Pensions
Qualified Solicitor or Barrister	Core Units 1A-3
Post-graduate Diploma in Legal Practice/Legal Practice Course	Core Unit 2
CFA UK Investment Management Certificate	Core Unit 4

*May depend on units passed, and/or CPD and/or other requirements. Contact PMI for guidance.

November 2015

Accreditation of Prior Learning (APL)

Any APL applications must be accompanied with a copy of certificate or proof of pass to qualify.



Pensions Management Institute

ACHIEVING PENSIONS EXCELLENCE

Please see overleaf for full APL list.

Personal Information	
Name:	
PIN Number:	
Address:	<hr/> <hr/>
Post code:	<hr/>
Email:	
Daytime Telephone number:	
Please tick here if any of these details have changed and our records can be updated:	<input type="checkbox"/>

Unit Credits	
Please indicate the PMI Units you wish to claim credit for:	
Core Unit 1A – Understanding Retirement Provision	<input type="checkbox"/>
Core Unit 2 – Regulation of Retirement Provision	<input type="checkbox"/>
Core Unit 3 – Running a Workplace Pensions Scheme	<input type="checkbox"/>
Core Unit 4 – Financing and Investing for Retirement Provision	<input type="checkbox"/>
Taxation, Retail Investment and Pensions	<input type="checkbox"/>

Qualifications		
Please give details of the qualification(s) obtained that enable you to gain APL		
Name and address of awarding body	Title of Qualification	Date awarded

Declaration	
I hereby apply and declare that all the information given on this form is correct.	
SIGNED _____	DATE _____

Payment Sheet for APL form



Pensions
Management
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ACHIEVING PENSIONS EXCELLENCE

Payment

- I enclose/have sent by BACS: £ I have made my BACS payment to HSBC Bank Plc, 100 Old Broad Street, London, EC2N 1BG
- Sort code 40-07-31 Account No. 61146203
- I have included my company name on the BACS details and

- I enclose my cheque made payable to **The Pensions Management Institute**

- Please debit the following account with £

Card Type: Visa Mastercard Delta Switch/Maestro Solo

Card Number:

Valid from: / Valid to: /

Security code (last 3 digits on signature strip):

Name (as shown on the card):

Billing Address (if different from mailing address): _____
