

Awards in Pension Trusteeship Examinations

READING LIST

In preparing for the examination candidates may find the following publications of use.

Core Reading

- Guidance/ Codes of Practice from the Pensions Regulator (www.thepensionsregulator.gov.uk)
- Pension Fund Trustee Handbook 9th Edition- Roger Self (Tottel Publishing UK, 2005 www.bloomsburyprofessional.com)
- The Pension Trustee's Handbook 7th Edition - Robin Ellison Thorogood, 2012 (www.thorogoodpublishing.co.uk)
- Written and regularly updated by Kevin LeGrand, a past president of PMI, [Spotlight on Pensions](#) provides a leading source of pensions analysis and guidance for trustees and other pensions professionals. The complete PMI Award in Pension Trusteeship (APT) exam syllabus and the TPR Scope Guidance for TKU are cross-referenced in the text of Spotlight. PMI members receive a 15% discount. Contact Pendragon on 0800 980 1332 or email raf.shergold@pendragon.co.uk for further information or to subscribe.
- Pensions Terminology – 8th edition 2011 – The Pensions Management Institute (<https://www.pensions-pmi.org.uk/news-and-publications/pensions-terminology/>) and The Pensions Research Accountants Group (PRAG). (www.prag.org.uk).

Further/Reference Reading

- Reports and Bulletins from the Pensions Ombudsman (www.pensions-ombudsman.org.uk) and the Pensions Advisory Service (www.pensionsadvisoryservice.org.uk)
- PMI News and Technical News and other specialist pensions' magazines (www.pensions-pmi.org.uk)
- Updates, reviews, commentaries on pensions from professional advisers
- Financial Reports of Pension Schemes. A Statement of Recommended Practice – 2015 SORP revised July 2018 (SORP) (or comprehensive summary) (PRAG) (<https://www.prag.org.uk/home/current-publications/>)
- "Made Simple" series – PLSA (<https://www.plsa.co.uk/Resources-Made-Simple-guides>)
- UK Actuarial Profession - Annual Review Institute and Faculty of Actuaries (www.actuaries.org.uk)
- HMRC Pensions Tax Manual <https://www.gov.uk/hmrc-internal-manuals/pensions-tax-manual>)
- The Pension Trustee's Investment Guide - Robin Ellison and Adam Jolly. Thorogood Publishing 2008.
- [Perspective](#), Pendragon's information service is the most comprehensive available collection of core pensions legal & regulatory texts, commentary and other important documents. Contact Pendragon on 0800 980 1332 or by email raf.shergold@pendragon.co.uk for further information or to subscribe.