**Core Unit 1A – Understanding Retirement Provision**

**Mock Examination**

**Recommended Time: 2 Hours**

1. You have been asked to present a training session on the two main types of pension schemes, defined benefit and defined contribution. Prepare a short presentation.

**25 Marks**

1. Outline what an occupational pension scheme is and how this differs to a personal pension scheme.

**10 Marks**

1. Your client is looking to set up a pension scheme for automatic enrolment. Please prepare a paper setting out the main features of automatic enrolment, who would be eligible and what requirements must be satisfied for the scheme to be a ‘qualifying’ scheme.

**20 Marks**

1. List 10 things schemes must follow under the disclosure requirements.

**10 Marks**

1. Outline the role of the Pensions Ombudsman.

**10 Marks**

1. You’re a benefits consultant, you’ve been asked to draft a report on Employer Financed Retirement Benefit Schemes. In your report you should explain what they are and the difference between unfunded EFRBS and Funded EFRBS.

**20 Marks**

1. List 5 things that make communications more effective.

**5 Marks**