

# NOTICE TO LEARNERS

## Learner Number

Your learner number is already specified on the answer script.

Learners can obtain their PMI numbers from their registered PMI profiles.

## What is allowed and what is not allowed for the examinations?

You **must** have access to the three scheme booklets (OPQ, RST and XYZ) and the Tables of Factors.

You **may** have access to any other useful material for reference purposes (e.g. HMRC Technical Pages, DWP information, copies of standard documentation used in your organisation, etc.).

**Please note** that any standard documentation or calculation / letter templates can only be used for reference purposes and **must not** be uploaded to form part of your answer script.

You **may** use a non-programmable calculator, but you **must not** use any other electronic devices (e.g. mobile phone, Ipad or Iphone).

## General Guidance

These examinations are a test of competence, and a high degree of accuracy is essential. The Examiners must be convinced that you are competent to carry out calculations for all three schemes and that your letters meet the required standard. To that end:

- You **must** attempt all the calculation case studies. If you omit a calculation case study, you will fail to demonstrate competence.
- You **must** attempt all the requested letters. If you omit a requested letter, you will fail to demonstrate competence.
- You **must** provide fully worked answers in accordance with scheme requirements. If you provide an answer (or an element of an answer) without

detailing the method of calculation and the end result is incorrect, you will lose more marks than had you shown your workings and got some elements correct.

- You **must** “Refer the case to your manager” if you identify that a member’s available Lump Sum Allowance (‘LSA’) or Lump Sum & Death Benefit Allowance (‘LS&DBA’) has been exceeded for a retirement case study.
- You **must** “Refer the case to your manager” if you identify that a member’s available Lump Sum & Death Benefit Allowance (‘LS&DBA’) has been exceeded for a death case study.
- You **must** clearly display the calculation results in the answers to your questions (an overall summary is not required if the calculation results have been detailed elsewhere in your answer).
- You **must** communicate the full range of options available to the member / beneficiaries in your letters and ensure that you request all information that needs to be provided before the benefits can be paid.
- You **must** address your letters to either the member (or spouse in the event of death) or the Trustees (whichever is the normal practice where you work) and ensure they are signed “AN Other”.

## **Results**

The results of these examinations will be issued to your centre contact (or direct to independent learners) within 3 months of the examinations having taken place. The exact date will appear on the PMI website nearer the time.

Updated March 2024