

NOTICE TO LEARNERS

Learner Number

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

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

You **should** ensure you have access to each of the Scheme Booklets (OPQ, RST and XYZ) and the Tables of Factors.

You **may** access 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 standard templates may only be used for reference purposes and **must not** be uploaded to form part of your answer.

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

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 proficient in carrying out calculations for the schemes being tested, and that your understanding and actions in relation to the communication requirements for the draft letter meet the expected standard. To that end:

- You **must** attempt both calculation case studies. Failure to do so will not demonstrate competence.
- You **must** attempt the communication requirements for the draft letter associated with one of the case studies. Failure to do so will not 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 providing a breakdown of how you arrived at that answer (or element of that answer), you will lose more marks than if you show your workings and get some elements correct.
- You **do not** have to provide a summary of your answers at the end of the question if this information has already been provided elsewhere.

- 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** ensure all data specified as needing to be communicated in the draft letter is accurately transcribed from the answering of your case study to your answer box.
- You **must** ensure any expected basic information not communicated in the draft letter is identified and detailed in your answer box.
- You **must** ensure any wrong information communicated in the draft letter is identified and corrected in your answer box.

Results

The intention is for the results of these examinations to be issued to you and you’re your employer within one month of the examinations having taken place. The exact date will appear on the PMI website nearer the time.

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